

BUDGET INFORMATION - Non-Construction Programs

1. Program/Project Identification No. EE0009984		2. Program/Project Title Weatherization Assistance Program: Bipartisan Infrastructure Law	
3. Name and Address Idaho Department of Health and Welfare 450 West State St, 2nd Floor Boise, ID 837020000		4. Program/Project Start Date 07/01/2022	5. Completion Date 06/30/2027

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		\$ 19,398,165.00		\$ 19,398,165.00
2.						
3.						
4.						
5. TOTAL		\$ 0.00	\$ 0.00	\$ 19,398,165.00	\$ 0.00	\$ 19,398,165.00

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	\$ 85,204.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 85,204.00
b. Fringe Benefits	\$ 39,782.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 39,782.00
c. Travel	\$ 0.00	\$ 0.00	\$ 54,605.00	\$ 0.00	\$ 54,605.00
d. Equipment	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
e. Supplies	\$ 3,051.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 3,051.00
f. Contract	\$ 0.00	\$ 2,729,606.00	\$ 0.00	\$ 1,397,829.00	\$ 19,113,448.00
g. Construction	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
h. Other Direct Costs	\$ 0.00	\$ 0.00	\$ 49,994.00	\$ 0.00	\$ 49,994.00
i. Total Direct Charges	\$ 128,037.00	\$ 2,729,606.00	\$ 104,599.00	\$ 1,397,829.00	\$ 19,346,084.00
j. Indirect Costs	\$ 52,081.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 52,081.00
k. Totals	\$ 180,118.00	\$ 2,729,606.00	\$ 104,599.00	\$ 1,397,829.00	\$ 19,398,165.00
7. Program Income	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

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		5. Completion Date 06/30/2027	

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	\$ 19,398,165.00	\$ 0.00	\$ 19,398,165.00

SECTION B - BUDGET CATEGORIES					
6. Object Class Categories	Grant Program, Function or Activity				Total (5)
	(1) PROGRAM OPERATIONS	(2) LIABILITY INSURANCE	(3) LEVERAGING	(4) FINANCIAL AUDITS	
a. Personnel	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 85,204.00
b. Fringe Benefits	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 39,782.00
c. Travel	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 54,605.00
d. Equipment	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
e. Supplies	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 3,051.00
f. Contract	\$ 12,757,403.00	\$ 225,000.00	\$ 0.00	\$ 90,000.00	\$ 19,113,448.00
g. Construction	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
h. Other Direct Costs	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 49,994.00
i. Total Direct Charges	\$ 12,757,403.00	\$ 225,000.00	\$ 0.00	\$ 90,000.00	\$ 19,346,084.00
j. Indirect Costs	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 52,081.00
k. Totals	\$ 12,757,403.00	\$ 225,000.00	\$ 0.00	\$ 90,000.00	\$ 19,398,165.00
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	\$ 19,398,165.00	\$ 0.00	\$ 19,398,165.00

SECTION B - BUDGET CATEGORIES

6. Object Class Categories	Grant Program, Function or Activity				Total
	(1) HEALTH AND SAFETY	(2)	(3)	(4)	(5)
a. Personnel	\$ 0.00				\$ 85,204.00
b. Fringe Benefits	\$ 0.00				\$ 39,782.00
c. Travel	\$ 0.00				\$ 54,605.00
d. Equipment	\$ 0.00				\$ 0.00
e. Supplies	\$ 0.00				\$ 3,051.00
f. Contract	\$ 1,913,610.00				\$ 19,113,448.00
g. Construction	\$ 0.00				\$ 0.00
h. Other Direct Costs	\$ 0.00				\$ 49,994.00
i. Total Direct Charges	\$ 1,913,610.00				\$ 19,346,084.00
j. Indirect Costs	\$ 0.00				\$ 52,081.00
k. Totals	\$ 1,913,610.00				\$ 19,398,165.00
7. Program Income	\$ 0.00				\$ 0.00

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IV.1 Subgrantees

Subgrantee (City)	Planned Funds/Units
Community Action Partnership, Inc. (Lewiston)	\$4,179,953.72 340
Eastern Idaho Community Action Partnership (Idaho Falls)	\$2,689,718.83 227
El-Ada Community Action Partnership (Boise)	\$3,894,957.66 341
Metro Community Services (Caldwell)	\$3,763,968.44 325
South Central Community Action Partnership (Twin Falls)	\$2,388,596.83 190
SouthEastern Idaho Community Action Agency (Pocatello)	\$2,196,252.52 174
Total:	\$19,113,448.00 1,597

IV.2 WAP Production Schedule

Weatherization Plans		Units
Total Units (excluding reweatherized)		1,597
Rewaterized 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	1,597
C	Total Units Reweatherized	0
D	Total Dwelling Units to be Weatherized and Reweatherized (B + C)	1,597
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	\$12,757,403.00
G	Total Dwelling Units to be Weatherized and Reweatherized (from line D)	1,597
H	Average Program Operations Costs per Unit (F divided by G)	\$7,988.36
I	Average Vehicles & Equipment Acquisition Cost per Unit (from line E)	\$0.00
J	Total Average Cost per Dwelling (H plus I)	\$7,988.36

IV.3 Energy Savings

Method used to calculate savings: ☒ WAP algorithm ☐ Other (describe below)				
	Units	Savings Calculator (MBtus)		Energy Savings
This Year Estimate	1597	29.3		46792
Prior Year Estimate	208	29.3		6094
Prior Year Actual	238	29.3		6973

Method used to calculate savings description:

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

1,597 units X 29.3 MBtu = 46,792 MBtus (Million British thermal units)

IV.4 DOE-Funded Leveraging Activities

Idaho receives funding from local utilities and organizations that they use in conjunction with Wx Funding. Agencies receive a small amount of funding from the approved formula award. No leveraging funds will be provided from BIL funding.

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 Zimmerman Phone: 5094958273 Email: renee.zimmerman@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: Alexa Sakolsky-Basquill Phone: 2083321675 Email: Alexa.Sakolsky-basquill@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: Jeremy Maxand Phone: 2083363335 Email: Jmaxand@lincidaho.org
Rocky Mountain Power	Type of organization: Utility 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

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State Tribal Relations	Type of organization: Unit of State Government Contact Name: Lisa Jaramillo Phone: 2085133508 Email: Lisa.Jaramillo@dhw.idaho.gov
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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
09/08/2022	Coeur d' Alene Press - August 20,2022 Idaho Press Tribune - August 21,2022 Idaho State Journal – August 28,2022 Idaho Statesman - August 21,2022 Lewiston Tribune - August 21,2022 Idaho Falls Post Register – August 21,2022 Magic Valley Times News – August 20,2022 Health and Welfare Website - August 26,2022 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: Lisa Johnson, 208-334-5739, Lisa.Johnson@dhw.idaho.gov

Recipient Principle Investigator: Lisa Johnson, 208-334-5739, Lisa.Johnson@dhw.idaho.gov

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

Idaho communicated a process with the 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 highest 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 to work with our 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 the attached ACSI Table.

BIL Ramp Up

Idaho has begun working with the Idaho Department of Labor to initiate an apprenticeship program to be utilized across the state. T&TA funds will support the development of this program. The apprenticeship program will provide individuals technical skills in the building science profession and will provide the opportunities to earn BPI credentials related to home performance. The intended goal of the program is to assist the weatherization network in hiring staff over the next six (6) to twelve (12) months. This initiative will help our Subgrantees fill openings within their existing programs and help fill newly needed positions because the BIL funding. Idaho expects to increase production levels by completing an additional 1,387 units, which more than doubles our regular DOE weatherization production completed annually. Idaho estimates a need to increase the number of retrofit installers within the WAP program a by an additional twenty (20) staff statewide.

Idaho will not be adding additional Subgrantees.

Subgrantees may look to identify additional contractors in their service area to complete specific measures in a home to help reduce the length of time to complete weatherization project.

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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, income eligible for assistance under the Low-Income Home Energy Assistance Program, having received cash assistance payments during the preceding twelve-month period under Titles IV and/or XVI of the Social Security Act, and/or are currently receiving HUD benefits (within the last 12 months) under any of HUD means tested programs.

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

Households must provide documentation of their gross income or a zero-income declaration form must be on file for households declaring no income. Copies are kept in the participant's file.

Prioritization for weatherization services is based on energy burden with special consideration for households comprised of elderly persons, persons with disabilities, and families with children under age 19.

Prior to an audit of a prospective dwelling, the subgrantee must have a completed application and all necessary paperwork, including proof of income eligibility, owner's name and address/contact information, renters need owners' consent.

Prior to any work being done on a dwelling, and prior to a subcontractor visiting the dwelling for purposes of evaluating job costs, the subgrantee must have a signed statement from the owner or their agent that permission has been granted to perform weatherization and baseload measures on and at the dwelling. At minimum the statement must include:

- A list of possible measures that may be installed;
- The residence is not currently for sale by owner of the property, nor is it designated for acquisition or clearance (foreclosure) by federal, state or local programs;
- That rent will not be increased, or renters evicted within twelve (12) months time of the completion of the weatherization services performed at the dwelling.

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

Idaho has a Programmatic Agreement (PA) with DOE. The most recent amendment was signed in October 2020.

Subgrantees are required to notify every household of their rights to a Fair Hearing.

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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. The dwelling may not receive further financial assistance for weatherization until the date that is 15 years after the date previous weatherization was completed using any federal funds, including DOE WAP, LIHEAP, BPA, HUD, or USDA, 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 separately for reporting purposes and are included in the total completed dwellings.

Describe what structures are eligible for weatherization

Eligible dwellings include site-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 twelve (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 twelve (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, the Department will be notified 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.

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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.

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.

Idaho does not currently meet the twenty percent (20%) requirement of multi-family completions necessary for use of a multi-family energy audit. Idaho will obtain DOE approval for weatherization work on any multi-family project larger than four units.

Describe the deferral Process

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): **19**

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.

Five (5) Native American tribes reside within 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 required to serve members of Native American tribes in the same manner and with equal benefit as those services provided to low-income non-tribal members in their respective service areas.

The Grantee will work with Direct Service Providers and encourage shared initiatives with tribal authorities. Direct Service

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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

Idaho's Direct Service Providers have defined service territories that provide coverage to every county in Idaho and ensure delivery of weatherization services are provided statewide.

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 19;
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 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

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V.5.1 Technical Guides and Materials

Idaho's Weatherization Operations Manual (IWOM) and Appendices are aligned to meet or exceed Standard Work Specifications (SWS) for Home Energy Upgrades. The approved IWOM will be distributed by the Grantee to all Direct Service Providers delivering services under WAP.

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.

All subgrants and agreements and vendor contracts will contain language which clearly states work performed meets the SWS specifications for work quality as prescribed by DOE program guidance, WPN 15-4, Section 2 and the IWOM.

Idaho has language in DSP subgrants requiring that technical manuals and field guides be provided to all staff and service providers/contractors prior to delivering WAP services.

Signatures on the DSP subgrant by the agency Executive Director and signatory authority on vendor contracts serves as acknowledgement.

Idaho will ensure that all weatherization activities not included in the list of Categorical Exclusion activities in Section 2.6 of WPN 22-1 require an Environmental Questionnaire (EQ-1) submission for review.

All Program Guidance updates are communicated by the Grantee to the Direct Service Providers via email upon receipt from DOE following the process detail below:

- A. Each DSP has been signed up to receive WAP program updates directly from DOE by email.
- B. IDHW shall advise the DSPs of policy updates via email and ensure DSP program managers have confirmed receipt, read and understand the guidance, are allowed time to review, comment, and implement changes expected.
- C. Updates with effective dates will be added to the Idaho Weatherization Operations Manual (IWOM) and/or other appropriate documents.
- D. Direct Service Providers will be monitored to this requirement to ensure consistency in responses.

The following language comes from the subgrantee contracts:

"Acceptance and signature on the contract providing DOE BIL funding to the subgrantee agency, will serve as proof of receipt of the SWS and Idaho Weatherization Operations Manual (IWOM)."

The Subgrantee must:

"Provide direct hires with technical requirements for field work including: audits/testing; installation of energy conservation, health and safety and incidental repair measures; and final inspections."

"Ensure contractors hired by the subgrantee have agreements that include the same technical requirements referenced above. Their work must be consistent with the Department standards and field guides and subgrantees must document acceptance and receipt of the requirements from all contractors"

Field guide types approval dates

Single-Family: 6/9/2021
Manufactured Housing: 6/9/2021
Multi-Family: 6/9/2021

V.5.2 Energy Audit Procedures

Audit Procedures and Dates Most Recently Approved by DOE

Audit Procedure: Single-Family
Audit Name: ECOS
Approval Date:

Audit Procedure: Manufactured Housing

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

(Grant Number: EE0009984, State: ID, Program Year: 2022)

Audit Name: ECOS
Approval Date:

Audit Procedure: Multi-Family
Audit Name:
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 July 5, 2022. The Energy Community Online System (ECOS) 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. All weatherization activities shall be performed in accordance with the DOE approved energy audit procedures and 10 CFR, Part 440 Appendix A.

ECOS is fully web-based and incorporates reporting modules, client eligibility data collection, inventory, and project management.

The Energy Audit processes submitted for utilizing ECOS in Idaho follow the baseline energy audit functions set out in the ECOS end-user manual.

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 guidelines set in WPN 22-1 for the duration of the five (5) year BIL grant.

Expenditures for health and safety measures 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.

Multi Family Energy Audits

Idaho does not currently meet the twenty percent (20%) requirement of multi-family completions necessary for use of a multi-family energy audit.

Idaho will obtain DOE approval for weatherization work on any multi-family project larger than four units.

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 Savings to Investment Ratio (SIR) or when justified for Health and Safety (H&S) reasons, Idaho will submit documentation as outlined in WPN 19-4, attachment 5, to our Project Officer for review and approval.

V.5.3 Final Inspection

A final inspection compliant with current DOE guidance and the Grantee's Quality Control Inspection Policy will be conducted on

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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.

The QCI 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.

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.

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

1. Direct Service Provider program will provide information on how the inadequate practice will be addressed; and
2. The Grantee 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.

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. The credential requirements for each Direct Service Provider's HEP-Certified staff will be actively monitored and continuing education will be provided on an as needed basis. .

To ensure that DSP projects are receiving inspections from QCI-certified inspectors and to the standard of SWS standards or DOE approved variances. These jobs will be verified quarterly. Quarterly monitoring will consist of five percent (5%) plus one (1) of completed units. This monitoring will review participant files 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.

V.6 Weatherization Analysis of Effectiveness

Idaho has effectively integrated diversity, equity, and inclusion objectives into the weatherization program by ensuring services are available to all citizens of Idaho statewide. Our Policy Advisory Council members represent the interests of underrepresented populations, ensuring our plan to administer weatherization services is fair and inclusive. Outreach to vulnerable populations (elderly, disabled, youth as well as low-income households) is conducted throughout the state, in various formats, to promote visibility to these services so all in need can apply and be served. The community action agencies throughout the state and the Grantee foster equal opportunity environments and employ a variety of individuals based on their abilities to serve the citizens of Idaho.

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

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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 Quarterly Monitoring Summary reports. Technical and financial systems and practices are reviewed by the Grantee 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.

Idaho's Health and Safety Program expenditures will not exceed fifteen percent (15%) 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.

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 three (3) staff persons' time, the Program Manager, a Program Analyst and the Program Specialist provide administrative oversight, training and technical assistance and reporting functions for this program.

Grantee time worked on Wx activities is billed to DOE funding, holiday and sick time is state funded.

IDHW staff applies a portion of their time to the following elements of the Weatherization program; 1. policy oversight, 2. technical guidance, 3. budget review and analysis, 4. contracts administration, 5. fair hearings input, 6. monitoring assistance, 7. PAGE submission, 8. reports

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

The six (6) Direct Service Providers listed in this State Plan also receive Wx formula grant funding.

V.8.2 Administrative Expenditure Limits

The Grantee will budget a maximum of fifteen percent (15%) of the new PY allocation for administrative purposes, with no less than seven and one-half percent (7.5%) being made available to Direct Service Providers.

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The Grantee will permit Direct Service Providers receiving grants of less than \$350,000 to receive up to an additional five percent (5%) of the new total PY allocation funds, 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.

V.8.3 Monitoring Activities

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.

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.

The Grantee performs desktop file reviews following the requirements outlined in the Idaho Weatherization Operations Manual. On-site technical monitoring activities are performed by network provided staff who hold current QCI certification. QCI monitoring will be conducted by the Grantee and/or QCI qualified staff and will ensure that completed projects meet the requirements outlined in the Idaho Weatherization Operations Manual. The QCI monitoring results and accompanying documentation will be provided to the Grantee.

The Grantee will coordinate on-site scheduling in a way that minimizes cost and ensures appropriate use of resources. Monitoring for completed Wx jobs will be completed at least once, annually. Monitoring travel costs will be charged to T&TA and administration.

The Grantee compiles all monitoring results, including accompanying documentation, and provides them to the Direct Service Providers. Direct Service Providers are required to correct any deficiencies identified during the monitor using non-federal funds. Monitoring 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.

The Grantee may increase the frequency and/or the percentage of units monitored when significant deficiencies or repeated deficiencies are identified during monitoring.

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 (IDHW).

Monitoring

Monitoring activities comprise three major parts:

1. Fiscal/Administrative monitoring (including a review of internal controls and agency health)
2. Quarterly 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.

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

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WX review:

- | | |
|---|-----------------|
| 1. Community Action Partnership, Inc. | May (2nd week) |
| 2. Eastern Idaho Community Action Partnership, Inc. | May (4th week) |
| 3. El Ada, Inc. | June (2nd week) |
| 4. Metro Community Services | June (4th week) |
| 5. South Central Community Action Partnership | July (3rd week) |
| 6. SouthEastern Idaho Community Action Agency, Inc. | July (3rd week) |

Financial/Administrative review:

- | | |
|---|------------------|
| 1. Community Action Partnership, Inc. | April (3rd week) |
| 2. Eastern Idaho Community Action Partnership, Inc. | April (4th week) |
| 3. El Ada, Inc. | May (2nd week) |
| 4. Metro Community Services | May (3rd week) |
| 5. South Central Community Action Partnership | May (4th week) |
| 6. SouthEastern Idaho Community Action Agency, Inc. | May (1st week) |

Projected Dates of Monitoring Visits

Monitoring visits for all Direct Service Providers will be scheduled between April and July and completed no later than July of each year. Please see Attachment 2a QCI_TMF to view the Technical Monitoring Form.

Approach

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.

An initial monitoring report is submitted within fifteen (15) business days. Direct Service Provider responses are due to the Grantee within thirty (30) days. Any significant findings require a Quality Improvement Plan (QIP) 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 the Grantee 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 the attached Corrective Action/Removal procedures.

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) days. Direct Service Provider responses are due to the Grantee 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 the Grantee 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 (IDHW). Any sensitive or significant noncompliance findings will be reported to the DOE Project Office 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

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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

Subgrantees periodically evaluate the needs of their staff, conduct self-assessments and review past monitoring reports to determine what training is needed for each WAP employee. Individual training is determined for each employee which aligns with DOE's JTA for their perspective role. Each Subgrantee has provided an estimated T&TA plan taking into consideration the increased production needs of the BIL funding over the 5-year grant period. Subgrantees are expected perform an ongoing evaluation of T&TA needs and then communicate any newly identified needs or changes to CAPAI and the Grantee to ensure training can be planned and coordinated. In addition, annual monitoring results and 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 will begin identifying available reports within ECOS that demonstrate energy savings achieved from each job and aggregate the savings by different variables. This information will be shared with each subgrantee. These reports will be used to identify training needs.

Idaho encourages all Direct Service Providers to attend industry conferences, including those offered by [Energy OutWest](#) 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 requires completion of Comprehensive Training that aligns with the NREL Job Task Analysis (JTA) for their position(s) for all WAP workers employed in one or more technical positions. Idaho will ensure we are using Interstate Renewable Energy Center (IREC) accredited training providers to administer the training. All Energy Auditor and Quality Control Inspectors will be required to achieve and maintain appropriate Home Energy Professional (HEP) certification, (BA or EA for Energy Auditors, QCI for Quality Control Inspectors) as appropriate to their job tasks.

Individuals working toward certification under the mentorship of a certified individual may perform work aligned with the applicable Job Task Analysis, but their work must be reviewed and signed off on by an individual with the appropriate certification, including the printed names, signatures, certification number (for the mentor), and dates for both the mentor and the mentee.

Existing technical weatherization staff are required to re-attend comprehensive training for the applicable JTA(s) before attempting to recertify their credentials or within four (4) years for JTAs without a regular certification timeline. New technical staff 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.

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

Specific Training

Subgrantees may receive Specific training pertaining to professional development and program/industry changes. This training is short-term training to address acute deficiencies in the field, single-issue, training, conferences, and program management or leadership training and will be provided on an as needed basis.

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

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

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part of the agency monitoring activities.

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

At least fifty percent (50%) of allocated Training and Technical Assistance funding must be expended on training prior to re-allocating this funding to Program Operation line items.

The Grantee focuses on identifying program gaps and T&TA needs of all CAA's, performs or coordinates T&TA and tracks completed T&TA statewide. The Grantee will work with DSPs to receive training regarding items of concern identified in the audit.

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 Grantee works with the DSPs prior to the start of the new program year to identify both mandatory and not mandatory training needs of their staff. The T&TA budget for each DSP is developed based on those specific training needs. The T&TA funding budgeted is a reflection of the total need across the Idaho Network for the upcoming program year. All budgeted T&TA funds are expected to be expended during that program year using IREC accredited training locations, as appropriate.

The T&TA budget also includes T&TA needs of the Grantee. This includes costs associated with on-site monitoring. The Grantee has brought on an additional person who is QCI-certified. This person will complete annual on-site quality assurance monitoring duties.

Provided Training

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. The DSPs schedule all mandatory trainings and tracks staff attendance.

Lead Training Certification

New staff hired by the direct service providers will be registered for Lead Safe Work Practice training within ninety (90) days of achieving 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 fourteen (14) 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.

Direct Service Providers will be responsible for securing retention agreements from staff or subcontractors in exchange for QCI training. The retention agreement should require that contractors will work in the Program for a specific amount of time that equates to the value of the costs associated with the T&TA provided.

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

Training Assessment

Direct Service Providers will produce and maintain permanent training records for staff that includes date of hire, course work,

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course date and training provider. Idaho’s Administrative Contractor and the Grantee 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

The Grantee 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. Quarterly - 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.

Percent of overall trainings

Comprehensive Trainings:	20.0
Specific Trainings:	80.0

Breakdown of T&TA training budget

Percent of budget allocated to Auditor/QCI trainings:	45.0
Percent of budget allocated to Crew/Installer trainings:	45.0
Percent of budget allocated to Management/Financial trainings:	10.0

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.