

APPLICATION FOR FEDERAL ASSISTANCE SF-424

Version 02

1. Type of Submission:		2. Type of Application:		If Revision, select appropriate letter(s)	
<input type="checkbox"/> Preapplication		<input type="checkbox"/> New			
<input checked="" type="checkbox"/> Application		<input checked="" type="checkbox"/> Continuation		Other (specify):	
<input type="checkbox"/> Changed/Corrected Application		<input type="checkbox"/> Revision			
3. Date Received 05/01/2024			4. Applicant Identifier:		
5a. Federal Entity Identifier:			5b. Federal Award Identifier: DE-EE0009895		
State Use Only:					
6. Date Received by State:			7. State Application Identifier:		
8. APPLICANT INFORMATION:					
a. Legal Name: Florida State of					
b. Employer/Taxpayer Identification Number (EIN/TIN): 364706134			c. UEI: WVR6ECT1G9F8		
d. Address:					
Street 1: 107 E. Madison St. MSC-400					
Street 2:					
City: Tallahassee					
County: LEON County					
State: FL					
Province:					
Country: U.S.A.					
Zip / Postal Code: 323990000					
e. Organizational Unit:					
Department Name: Florida Department of Commerce			Division Name: Community Development		
f. Name and contact information of person to be contacted on matters involving this application:					
Prefix: Mr First Name: Frankie					
Middle Name:					
Last Name: Hernandez					
Suffix:					
Title: Interim Bureau Chief					
Organizational Affiliation:					
Telephone Number: 8507178458			Fax Number:		
Email: frankie.hernandez@commerce.FL.gov					

APPLICATION FOR FEDERAL ASSISTANCE SF-424

Version 02

9. Type of Applicant:

A State Government

10. Name of Federal Agency:

U. S. Department of Energy

11. Catalog of Federal Domestic Assistance Number:

81.042

CFDA Title:

Weatherization Assistance Program

12. Funding Opportunity Number:

DE-WAP-0002024

Title:

2024 Weatherization Assistance Program (WAP)

13. Competition Identification Number:

Title:

14. Areas Affected by Project (Cities, Counties, States, etc.):

Statewide

15. Descriptive Title of Applicant's Project:

Weatherization Assistance Program for Low-Income Persons

APPLICATION FOR FEDERAL ASSISTANCE SF-424

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16. Congressional District Of:

a. Applicant: Florida Congressional District 02

b. Program/Project: FL-02

Attach an additional list of Program/Project Congressional Districts if needed:**17. Proposed Project:**

a. Start Date: 07/01/2024

b. End Date: 06/30/2025

18. Estimated Funding (\$):

a. Federal	4,169,206.00
b. Applicant	0.00
c. State	0.00
d. Local	0.00
e. Other	0.00
f. Program Income	0.00
g. TOTAL	4,169,206.00

19. Is Application subject to Review By State Under Executive Order 12372 Process?:

- a. This application was made available to the State under the Executive Order 12372 Process for review
- b. Program is subject to E.O. 12372 but has not been selected by the State for review.
- c. Program is not covered by E.O. 12372

20. Is the applicant Delinquent On Any Federal Debt? (If "Yes", provide explanation)

No

21. By signing this application, I certify (1) to the statements contained in the list of certifications and (2) that the statements herein are true, complete and accurate to the best of my knowledge. I also provide the required assurances** and agree to**

 I AGREE

** The list of certifications and assurances, or an internet site where you may obtain this list, is contained in the announcement or agency

Authorized Representative:

Prefix: Ms First Name: Caroline

Middle Name: B.

Last Name: Womack

Suffix:

Title: Deputy Chief Financial Officer

Telephone Number: 8502457126

Fax Number:

Email: Caroline.Womack@deo.myflorida.com

Signature of Authorized Representative: Signed Electronically

Date Signed: 09/16/2024

U.S. DEPARTMENT OF ENERGY



BUDGET JUSTIFICATION FOR FORMULA GRANTS

Applicant: Florida State of
Award number: EE0009895

Budget period: 07/01/2024 - 06/30/2025

1. PERSONNEL - Prime Applicant only (all other participant costs are listed in 6 below and form SF-242A, Section B.
Line 6.f. Contracts and Sub-Grants).

Positions to be supported under the proposed award and brief description of the duties of professionals:

<u>Position</u>	<u>Description of Duties of Professionals</u>
WAP Program Manager	Administration of contracting, monitoring, evaluation, training and technical assistance for the program. 60% Weatherization (30% WAP, 30% WAP BIL) The remaining 40% is paid with other funding sources.
Government Operations Consultant II (GOC II)	Serves as a subgrant manager and program monitor and provides technical assistance and training through on-site visits and program analysis. HHS LIHEAP and CSBG funding to cover remainder of staff time.
Chief, Bureau of Economic Self-Sufficiency	This position serves as the Chief of the Bureau of Economic Self-Sufficiency administering the Weatherization Assistance Program, Low Income Home Energy Assistance Program and Community Services Block Grant. HHS LIHEAP and CSBG funding to cover remainder of staff time.
Government Operations Consultant III (GOC III)	Serves as the Policy Team Lead, high-level Contract Manager for Weatherization. The remaining percentage is paid for by other funding sources.
Government Operations Consultant II (GOC II)	Serves as a subgrant manager and program monitor and provides technical assistance and training through on-site visits and program analysis. HHS LIHEAP and CSBG funding to cover remainder of staff time.
Deputy Chief, Bureau of Economic Self-Sufficiency	This position serves as the Deputy to the Chief of the Bureau of Economic Self-Sufficiency administering the Weatherization Assistance Program, Low Income Home Energy Assistance Program and Community Services Block Grant. HHS LIHEAP and CSBG funding to cover remainder of staff time.
Government Operations Consultant II (GOC II)	Serves as a subgrant manager and program monitor and provides technical assistance and training through on-site visits and program analysis. HHS LIHEAP and CSBG funding to cover remainder of staff time.
GOC III	Serves as technical team lead. The remaining percentage is paid for by other funding sources.

Direct Personnel Compensation:

<u>Position</u>	<u>Salary/Rate</u>	<u>Time</u>	<u>Direct Pay</u>
WAP Program Manager	\$60,000.00	59.9999 % FT	\$35,999.94
Government Operations Consultant II (GOC II)	\$44,160.00	29.9999 % FT	\$13,247.96
Chief, Bureau of Economic Self-Sufficiency	\$91,944.12	32.9999 % FT	\$30,341.47
Government Operations Consultant III (GOC III)	\$48,140.52	39.9999 % FT	\$19,256.16
Government Operations Consultant II (GOC II)	\$44,500.08	29.9998 % FT	\$13,349.94
Deputy Chief, Bureau of Economic Self-Sufficiency	\$68,217.76	14.9999 % FT	\$10,232.60
Government Operations Consultant II (GOC II)	\$42,776.88	29.9998 % FT	\$12,832.98
GOC III	\$48,000.00	59.9999 % FT	\$28,799.95

Direct Pay Total \$164,061.00

2. FRINGE BENEFITS

- a. Are the fringe cost rates approved by a Federal Agency? If so, identify the agency and date of latest rate agreement or audit below, and attach a copy of the rate agreement to the application.

- b. If a. above does not apply, please use this box (or an attachment) to further explain how your total fringe benefits costs were calculated. Your calculations should identify all rates used, along with the base they were applied to (and how the base was derived), and a total for each (along with grand total). If there is an established computation methodology approved for state-wide use, please provide a copy. Also, please fill out the table below with the Fringe Benefits Calculations.

Employer contribution rates are set by State and Federal law. On average, employer contribution rates for program year 2023 are approximately 38% of employee's salaries. Employer contribution rates are composed of social security (approximately 6.2%), state retirement (approximately 8.85%), health/life/disability insurance (22.70%), and pretax administrative assessments (.25%). Please note that these percentages vary per employee depending on the benefit selection.

Fringe Benefits Calculations

<u>Position</u>	<u>Direct Pay</u>	<u>Rate</u>	<u>Benefits</u>
WAP Program Manager	\$35,999.94	38.0003 %	\$13,680.09
Government Operations Consultant II (GOC II)	\$13,247.96	38.0006 %	\$5,034.30
Chief, Bureau of Economic Self-Sufficiency	\$30,341.47	38.0002 %	\$11,529.82
Government Operations Consultant III (GOC III)	\$19,256.16	38.0004 %	\$7,317.42
Government Operations Consultant II (GOC II)	\$13,349.94	38.0006 %	\$5,073.06
Deputy Chief, Bureau of Economic Self-Sufficiency	\$10,232.60	38.0007 %	\$3,888.46
Government Operations Consultant II (GOC II)	\$12,832.98	38.0006 %	\$4,876.61
GOC III	\$28,799.95	38.0003 %	\$10,944.07
		Fringe Benefits Total	\$62,343.83

3. TRAVEL

- a. Please provide the purpose of travel, such as professional conference(s), DOE sponsored meeting(s), project management meeting, etc. If there is any foreign travel, please identify.

<u>Purpose of Trip</u>	<u>Number of Trips</u>	<u>Cost Per Trip</u>	<u>Total</u>
Energy Out West Inc. Conference	2	\$3,500.00	\$7,000.00
Training for 10 staff (Comprehensive)	10	\$400.00	\$4,000.00
Training for 10 staff (Specific Training)	10	\$300.00	\$3,000.00
Statewide Meeting	3	\$1,000.00	\$3,000.00
Statewide Monitoring, Training & Technical Assistance visits to Subgrantees. Florida utilizes percentage of other funding source to supplement additional state monitoring costs.	18	\$800.00	\$14,400.00
National Association of State Community Services Programs (NASCS) Conference	3	\$3,500.00	\$10,500.00
Department of Energy Training Opportunities	2	\$250.00	\$500.00
		Travel Total	\$42,400.00

- b. Please provide the basis for estimating the costs, such as past trips, current quotations, Federal Travel Regulations, etc. All listed travel must be necessary for the performance of the award objectives.

Cost estimates for travel activities are based upon past travel costs and follow state travel guidelines.

4. EQUIPMENT - Equipment is generally defined as an item with an acquisition cost greater than \$10,000 and a useful life expectancy of more than one year.

- a. List all proposed equipment below and briefly justify its need as it applies to the objectives of the award.

Equipment	Unit Cost	Number	Total Cost	Justification of Need
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- b. Please provide a basis of cost such as vendor quotes, catalog prices, prior invoices, etc. and justify need. If the Equipment is being proposed as Cost Share and was previously acquired, please provide the source and value of its contribution to the project and logical support for the estimated value shown. If it is new equipment which will retain a useful life upon completion of the project, provide logical support for the estimated value shown. Also, please indicate whether the Equipment is being used for other projects or is 100% dedicated to the DOE project.

No equipment purchase planned.

5. SUPPLIES - Supplies are generally defined as an item with an acquisition cost of \$10,000 or less and a useful life expectancy of less than one year. Supplies are generally consumed during the project performance.

- a. List all proposed supplies below, the estimated cost, and briefly justify the need for the supplies as they apply to the objectives of the award. Note that all direct costs, including Supply items, may not be duplicative of supply costs included in the indirect pool that is the basis of the indirect rate applied for this project.

General Category	Cost	Justification of Need
N/A	\$0.00	N/A
	\$0.00	

- b. Please provide a basis of cost for each item listed above and justify need. Examples include vendor quotes, prior purchases of similar or like items, published price list, etc.

Any supplies purchased are included in the indirect pool.

6. CONTRACTS AND SUBGRANTS - Provide the following information for New proposed subrecipients and subcontractors. For ongoing subcontractors and subrecipients, this information does not have to be restated here, if it is provided elsewhere in the application; under Name of Proposed Sub, indicate purpose of work and where additional information can be found (i.e weatherization subgrants, Annual File section IV.1).

Name of Proposed Sub	Total Cost	Basis of Cost*
Contractual Services - T&TA Activities - QAI Procurement	\$45,108.00	Procurement of Quality Assurance Inspector (QAI) - Outsourcing costs to the State office for conducting it's QAI/QCI during Subrecipient monitoring visits. FloridaCommerce plans to expand procurement and increase the amount of vendors available to conduct QAI/QCI across the State. The contract is being executed; purchasing department is doing final review to get the vendor in place. This will not affect the approval of the award.

Contractual Services - T&TA Activities - Florida Association for Community Action (FACA)	\$149,388.00	Annual Statewide Conference - Venue, training, materials, speakers; FACA will plan, coordinate, and facilitate Weatherization T&TA activities in collaboration with the Florida Weatherization Network representing members of FACA and DEO staff. Training topics include but are not limited to: Energy Auditor, Quality Control Inspector (QCI), Blower Door Assisted Weatherization, Standard Work Specifications (SWS), ASHRAE 62.2, Manual J Calculation, Customer Service Best Practices and other topics approved by DEO.
Contractual Services - T&TA Activities - Reporting System Enhancement	\$44,723.00	Web-based reporting system utilized by Subrecipients for submitting monthly reports and collecting client-level data statistics. Includes associated monthly maintenance agreement charges.
Subrecipients Listed in Annual File, Section IV.1	\$5,639,696.00	Includes all funds allocated to: Subrecipient Administration; Subrecipient T&TA, Program Operations, Health and Safety; Liability Insurance, Single Audit, and Weatherization Readiness Fund.
Contracts and Subgrants Total	\$5,878,915.00	

*For example, Competitive, Historical, Quote, Catalog

7. OTHER DIRECT COSTS - Other direct costs are direct cost items required for the project which do not fit clearly into other categories. These direct costs may not be duplicative of costs included in the indirect pool that is the basis of the indirect rate applied for this project. Examples are: conference fees, subscription costs, printing costs, etc.

a. Please provide a General Description, Cost and Justification of Need.

General Description	Cost	Justification of Need
Overhead Costs	\$5,916.00	These costs represent the grant's fair share of directly allocated overhead costs including, but not limited to supplies, phones, risk management, and rent.
Other Direct Costs Total	\$5,916.00	

b. Please provide a basis of cost for each item listed above. Examples include vendor quotes, prior purchases of similar or like items, published price list, etc.

All costs included in Other Direct Costs are properly excluded from indirect costs to ensure there are not duplicate charges. All costs proposed are only being used in support of the WAP program.

8. INDIRECT COSTS

a. Are the indirect cost rates approved by a Federal agency? If so, identify the agency and date of latest rate agreement or audit and provide a copy of the rate agreement.

For PY 2023, DEO is using an indirect rate of 45.559% per the agreement dated January 24, 2023. The base is total direct salaries and wages including all applicable fringe benefits.

b. If the above does not apply, indicate the basis for computation of rates, including the types of benefits to be provided, the rate(s) used, and the cost base for each rate. You may provide the information below or provide the calculations separately.

The name and phone number of the individual responsible for negotiating the State's indirect cost rates.

Name: Caroline Womack Phone Number: 8502457126

Indirect costs calculations:

Indirect Cost Account	Direct Total	Indirect Rate	Total Indirect
DEO Salaries - Personnel & Benefits	\$226,405.19	46.7700 %	\$105,889.71
		Indirect Costs Total	\$105,889.71

BUDGET INFORMATION - Non-Construction Programs

1. Program/Project Identification No. EE0009895		2. Program/Project Title Weatherization Assistance Program	
3. Name and Address Florida State of 107 E. Madison St. MSC-400 Tallahassee, FL 323990000		4. Program/Project Start Date 07/01/2024	5. Completion Date 06/30/2025

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		\$ 4,169,206.00		\$ 4,169,206.00
2. Carryover			\$ 2,090,320.00		\$ 0.00	\$ 2,090,320.00
3.						
4.						
5. TOTAL		\$ 0.00	\$ 2,090,320.00	\$ 4,169,206.00	\$ 0.00	\$ 6,259,526.00

SECTION B - BUDGET CATEGORIES

6. Object Class Categories	Grant Program, Function or Activity				Total (5)
	(1) GRANTEE ADMINISTRATION	(2) SUBGRANTEE ADMINISTRATION	(3) GRANTEE T&TA	(4) SUBGRANTEE T&TA	
a. Personnel	\$ 114,843.00	\$ 0.00	\$ 49,218.00	\$ 0.00	\$ 164,061.00
b. Fringe Benefits	\$ 43,641.00	\$ 0.00	\$ 18,703.00	\$ 0.00	\$ 62,344.00
c. Travel	\$ 42,400.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 42,400.00
d. Equipment	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
e. Supplies	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
f. Contract	\$ 0.00	\$ 312,690.00	\$ 239,219.00	\$ 360,485.00	\$ 5,878,915.00
g. Construction	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
h. Other Direct Costs	\$ 5,916.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 5,916.00
i. Total Direct Charges	\$ 206,800.00	\$ 312,690.00	\$ 307,140.00	\$ 360,485.00	\$ 6,153,636.00
j. Indirect Costs	\$ 105,890.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 105,890.00
k. Totals	\$ 312,690.00	\$ 312,690.00	\$ 307,140.00	\$ 360,485.00	\$ 6,259,526.00
7. Program Income	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

BUDGET INFORMATION - Non-Construction Programs

1. Program/Project Identification No. EE0009895		2. Program/Project Title Weatherization Assistance Program	
3. Name and Address Florida State of 107 E. Madison St. MSC-400 Tallahassee, FL 323990000		4. Program/Project Start Date 07/01/2024	5. Completion Date 06/30/2025

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	\$ 2,090,320.00	\$ 4,169,206.00	\$ 0.00	\$ 6,259,526.00

SECTION B - BUDGET CATEGORIES						
6. Object Class Categories	Grant Program, Function or Activity					Total (5)
	(1) PROGRAM OPERATIONS	(2) HEALTH AND SAFETY	(3) LIABILITY INSURANCE	(4) FINANCIAL AUDITS		
a. Personnel	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 164,061.00	
b. Fringe Benefits	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 62,344.00	
c. Travel	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 42,400.00	
d. Equipment	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	
e. Supplies	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	
f. Contract	\$ 3,846,956.00	\$ 303,342.00	\$ 50,000.00	\$ 70,000.00	\$ 5,878,915.00	
g. Construction	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	
h. Other Direct Costs	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 5,916.00	
i. Total Direct Charges	\$ 3,846,956.00	\$ 303,342.00	\$ 50,000.00	\$ 70,000.00	\$ 6,153,636.00	
j. Indirect Costs	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 105,890.00	
k. Totals	\$ 3,846,956.00	\$ 303,342.00	\$ 50,000.00	\$ 70,000.00	\$ 6,259,526.00	
7. Program Income	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	

BUDGET INFORMATION - Non-Construction Programs

1. Program/Project Identification No. EE0009895	2. Program/Project Title Weatherization Assistance Program
3. Name and Address Florida State of 107 E. Madison St. MSC-400 Tallahassee, FL 323990000	4. Program/Project Start Date 07/01/2024
	5. Completion Date 06/30/2025

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	\$ 2,090,320.00	\$ 4,169,206.00	\$ 0.00	\$ 6,259,526.00

SECTION B - BUDGET CATEGORIES

6. Object Class Categories	Grant Program, Function or Activity				Total (5)
	(1) WEATHERIZATI ON READINESS	(2)	(3)	(4)	
a. Personnel	\$ 0.00				\$ 164,061.00
b. Fringe Benefits	\$ 0.00				\$ 62,344.00
c. Travel	\$ 0.00				\$ 42,400.00
d. Equipment	\$ 0.00				\$ 0.00
e. Supplies	\$ 0.00				\$ 0.00
f. Contract	\$ 696,223.00				\$ 5,878,915.00
g. Construction	\$ 0.00				\$ 0.00
h. Other Direct Costs	\$ 0.00				\$ 5,916.00
i. Total Direct Charges	\$ 696,223.00				\$ 6,153,636.00
j. Indirect Costs	\$ 0.00				\$ 105,890.00
k. Totals	\$ 696,223.00				\$ 6,259,526.00
7. Program Income	\$ 0.00				\$ 0.00

U.S. Department of Energy
WEATHERIZATION ASSISTANCE PROGRAM
SUBGRANTEE INFORMATION
State: FL Grant Number: EE0009895 Program Year: 2024

Name: Bay County Council on Aging, Inc.		Contact: Ms. Elizabeth N. Coulliette
Address: 1116 Frankford Avenue		UEI: UW19KMMKC144
Panama City, FL 32401-0000		DUNS: 171124621
Counties served: BAY County		Phone: (850) 769-3468
Tentative allocation: \$ 219,120.00		Fax: (850) 872-2151
Planned units: 9		Email: elizabeth.coulliette@gmail.com
Type of organization: Non-profit organization		Congressional districts served: <u>CD</u>
Source of labor: Contractors		FL-02

Name: Brevard County Board of County Commissioners		Contact: Mr. Ian Golden, Executive Director
Address: Department of Housing and Human Ser		UEI: XSTGNLF9ZDJ5
2725 Judge Fran Jamieson Way, Bldg B First Floor		DUNS: 106520666
Melbourne, FL 32940-0000		Phone: (321) 633-2076
Counties served: BREVARD County		Fax: (321) 633-2026
Tentative allocation: \$ 250,084.00		Email: ian.golden@brevardcounty.us
Planned units: 12		Congressional districts served: <u>CD</u>
Type of organization: Unit of local government		FL-08
Source of labor: Contractors		

Name: Capital Area Community Action Agency, Inc.		Contact: Mr. Tim Center, Executive Director
Address: Post Office Drawer 1775		UEI: X13EDG5RKDF1
309 Office Plaza Drive		DUNS: 803636950
Tallahassee, FL 32301-0000		Phone: (850) 222-2043
Counties served: GULF County		Fax: (850) 942-2090
WAKULLA County		Email: tim.center@cacaainc.org
FRANKLIN County		Congressional districts served: <u>CD</u>
JEFFERSON County		FL-08
LEON County		
LIBERTY County		
GADSDEN County		
CALHOUN County		
Tentative allocation: \$ 394,806.00		
Planned units: 21		
Type of organization: Non-profit organization		
Source of labor: Contractors		

U.S. Department of Energy
WEATHERIZATION ASSISTANCE PROGRAM
SUBGRANTEE INFORMATION
State: FL Grant Number: EE0009895 Program Year: 2024

Name: **Central Florida Community Action Agency, Inc.** Contact: Ms. Caroline W. Looney
UEI: M5M3WACM2N33
DUNS: 046753901
Address: 411 North Main St., Phone: (352) 373-7667
Suite 210 Fax: () -
Gainesville, FL 32601-0000 Email: clooney@cfcaa.org

Counties served:	LEVY County	Tentative allocation:	\$ 251,828.00	Congressional districts served:	<u>CD</u>
	ALACHUA County	Planned units:	26		FL-03
	MARION County	Type of organization:	Non-profit organization		FL-11
					FL-05

Source of labor: Contractors

Name: **Centro-Campesino Farmworker Center, Inc.** Contact: Mr. John Martinez, Executive Director
UEI: CT9ZXHVKLJZ1
DUNS: 173849191
Address: Post Office Box 343449 Phone: (305) 245-7738
35801 Southwest 186th Street Fax: (305) 245-0078
Florida City, FL 33034-0000 Email: jmartinez@ccfcfl.org

Counties served:	ST. LUCIE County	Tentative allocation:	\$ 701,870.00	Congressional districts served:	<u>CD</u>
	PALM BEACH County	Planned units:	76		FL-21
	COLLIER County	Type of organization:	Non-profit organization		FL-19
	HIGHLANDS County				FL-25
	HARDEE County				FL-08
	OKEECHOBEE County				FL-01
	ALACHUA County				FL-18
	DESOTO County				FL-20
	HENDRY County				FL-17
	BROWARD County				
	GLADES County				
	MARTIN County				
	LEE County				
	INDIAN RIVER County				

Source of labor: Agency and Contractors

Name: **Community Action Program Committee, Inc.** Contact: Mr. Douglas Brown, Executive Director
UEI: QA8HEH6FZTB9
DUNS: 087511069
Address: Post Office Box 628 Phone: (850) 438-4022
1380 North Palafox Street Fax: (850) 438-0121
Pensacola, FL 32501-2641 Email: d.brown@capc-pensacola.org

U.S. Department of Energy
WEATHERIZATION ASSISTANCE PROGRAM
SUBGRANTEE INFORMATION
 State: FL Grant Number: EE0009895 Program Year: 2024

Counties served:	ESCAMBIA County SANTA ROSA County OKALOOSA County WASHINGTON County HOLMES County WALTON County JACKSON County	Tentative allocation: \$ 365,381.00 Planned units: 39 Type of organization: Non-profit organization	Congressional districts served:	<u>CD</u> FL-02 FL-01
Source of labor: Contractors				

Name: Lake Community Action Agency, Inc.	Contact: Mr. James H. Lowe, Executive Director
	UEI: JN1HBA41ANY4
Address: 501 North Bay Street Eustis, FL 32726-0000	DUNS: 606560985 Phone: (352) 357-3497 Fax: (352) 483-2298 Email: jamesl@lakecaa.org
Counties served:	LAKE County
	Tentative allocation: \$ 134,707.00 Planned units: 8 Type of organization: Non-profit organization
	Congressional districts served:
	<u>CD</u> FL-05 FL-10
Source of labor: Contractors	

Name: Meals on Wheels, Etc., Inc.	Contact: Mr. Michael McKee, Executive Director
	UEI: HZBZCPC9CG67
Address: 2801 South Financial Court Sanford, FL 32773-0000	DUNS: 186527834 Phone: (407) 333-8877 Fax: (407) 829-2468 Email: mmckee@mealsetc.org
Counties served:	SEMINOLE County
	Tentative allocation: \$ 150,945.00 Planned units: 9 Type of organization: Non-profit organization
	Congressional districts served:
	<u>CD</u> FL-07
Source of labor: Contractors	

Name: Miami-Dade County	Contact: Ms. Sonia Grice, Department Director
	UEI: MKEJWVSEURF3
Address: 701 North West 1st Court, 10th floor Miami, FL 33136-0000	DUNS: 004148292 Phone: (786) 469-4644 Fax: (786) 469-4750 Email: sonia.grice@miamidade.gov
Counties served:	MIAMI-DADE County
	Tentative allocation: \$ 333,941.00 Planned units: 32 Type of organization: Unit of local government
	Congressional districts served:
	<u>CD</u> FL-25 FL-26
Source of labor: Contractors	

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Name: **Mid Florida Community Services, Inc.** Contact: Mr. Mat Kline, CEO
UEI: FNA3CKDAEDN3
DUNS: 084719640
Address: Post Office Box 896 Phone: (352) 796-5222
820 Kennedy Boulevard Fax: (352) 796-9952
Brooksville, FL 34605-0000 Email: mkline@mfc.us.com

Counties served:	HERNANDO County	Tentative allocation: \$ 537,215.00	Congressional districts served:	<u>CD</u>
	CITRUS County	Planned units: 40		FL-11
	SUMTER County	Type of organization: Non-profit organization		FL-07
	PASCO County			FL-12
	VOLUSIA County			FL-06

Source of labor: Contractors

Name: **Monroe County Board of County Commissioners** Contact: Ms. Sheryl Graham, Social Services Director
UEI: QKLSCT2LM7M9
DUNS: 073876757
Address: 1100 Simonton Street Phone: (305) 292-4510
Suite 2-257 Fax: (305) 295-4359
Key West, FL 33040-0000 Email: graham-sheryl@monroecounty-fl.gov

Counties served:	MONROE County	Tentative allocation: \$ 97,872.00	Congressional districts served:	<u>CD</u>
		Planned units: 2		FL-26
		Type of organization: Unit of local government		
		Source of labor: Contractors		

Name: **Northeast Florida Community Action Agency, Inc.** Contact: Ms. Kimberly Cobb-Ray, Executive Director
UEI: YUJTX2YPG8V3
DUNS: 050055185
Address: Post Office Box 52025 Phone: (904) 398-7472
4070 Boulevard Center Drive, Suite 200 Fax: (904) 398-7414
Jacksonville, FL 32207-2823 Email: kcray@nfcaa.org

Counties served:	PUTNAM County	Tentative allocation: \$ 562,797.00	Congressional districts served:	<u>CD</u>
	BAKER County	Planned units: 41		FL-06
	DUVAL County	Type of organization: Non-profit organization		FL-04
	FLAGLER County			FL-05
	NASSAU County			

Source of labor: Contractors

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Name: Osceola County Council on Aging, Inc.	Contact: Ms. Wendy Ford, Chief Executive Officer	
	UEI: X6WFHB2KNCB5	
Address: 700 Generation Point	DUNS: 163153661	
Kissimmee, FL 34744-0000	Phone: (407) 483-1494	
	Fax: (407) 846-8550	
	Email: fordw@osceola-coa.com	
Counties served: ORANGE County	Tentative allocation: \$ 482,089.00	Congressional districts served: <u>CD</u>
OSCEOLA County	Planned units: 34	FL-07
	Type of organization: Non-profit organization	FL-09
		FL-08
	Source of labor: Agency and Contractors	

Name: Pinellas County Urban League, Inc.	Contact: Ms. Charlotte Anderson, Interim President/CE	
	UEI: X5ECCAJYYMF4	
Address: 333 31st Street North	DUNS: 032594251	
St. Petersburg, FL 33713-7603	Phone: (727) 327-3568103	
	Fax: (727) 321-8349	
	Email: canderson@pcul.org	
Counties served: PINELLAS County	Tentative allocation: \$ 309,656.00	Congressional districts served: <u>CD</u>
	Planned units: 18	FL-12
	Type of organization: Non-profit organization	FL-13
	Source of labor: Contractors	

Name: St. Johns Housing Partnership, Inc.	Contact: Mr. William Lazar, Executive Director	
	UEI: NGGHB1L4KMR4	
Address: 525 West King Street	DUNS: 097620392	
Post Office Box 1086	Phone: (904) 824-0902	
St. Augustine, FL 32084-0000	Fax: (904) 824-9635	
	Email: blazar@sjhp.org	
Counties served: ST. JOHNS County	Tentative allocation: \$ 181,306.00	Congressional districts served: <u>CD</u>
CLAY County	Planned units: 17	FL-07
	Type of organization: Non-profit organization	
	Source of labor: Agency	

Name: Step Up Suncoast, Inc.	Contact: Ms. Amy Yount, President and CEO
	UEI: JKMNP2K3JF13
Address: 6428 Parkland Drive	DUNS: 058251356
Sarasota, FL 34243-0000	Phone: (941) 827-28877901
	Fax: (941) 827-3001
	Email: ayount@stepupsuncoast.org

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SUBGRANTEE INFORMATION
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Counties served:	MANATEE County SARASOTA County CHARLOTTE County	Tentative allocation: \$ 177,989.00 Planned units: 16 Type of organization: Non-profit organization Source of labor: Contractors	Congressional districts served:	<u>CD</u> FL-16 FL-17
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Name: **TO BE DETERMINED**

Contact: Mat Kline
UEI: FNA3CKDAEDN3
DUNS:
Phone: (352) 796-5222
Fax: () -
Email: mkline@mfc.us.com

Address: 820 Kennedy Blvd
Brooksville, FL 34601-0000

Counties served:	HILLSBOROUGH County POLK County	Tentative allocation: \$ 327,423.00 Planned units: 42 Type of organization: Local agency Source of labor: Agency	Congressional districts served:	<u>CD</u> FL-14
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Name: **TO BE DETERMINED**

Contact: Tim Center
UEI: X13EDG5RKDF1
DUNS:
Phone: (850) 222-2043105
Fax: () -
Email: tim.center@cacaainc.org

Address: 309 Office Plaza Dr
Tallahassee, FL 32301-0000

Counties served:	HAMILTON County DIXIE County TAYLOR County COLUMBIA County BRADFORD County SUWANNEE County GILCHRIST County LAFAYETTE County MADISON County UNION County	Tentative allocation: \$ 160,667.00 Planned units: 14 Type of organization: Local agency Source of labor: Agency	Congressional districts served:	<u>CD</u> FL-02
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IV.1 Subgrantees

Subgrantee (City)	Planned Funds/Units
Bay County Council on Aging, Inc. (Panama City)	\$219,120.00 9
Brevard County Board of County Commissioners (Melbourne)	\$250,084.00 12
Capital Area Community Action Agency, Inc. (Tallahassee)	\$394,806.00 21
Central Florida Community Action Agency, Inc. (Gainesville)	\$251,828.00 26
Centro-Campesino Farmworker Center, Inc. (Florida City)	\$701,870.00 76
Community Action Program Committee, Inc. (Pensacola)	\$365,381.00 39
Lake Community Action Agency, Inc. (Eustis)	\$134,707.00 8
Meals on Wheels, Etc., Inc. (Sanford)	\$150,945.00 9
Miami-Dade County (Miami)	\$333,941.00 32
Mid Florida Community Services, Inc. (Brooksville)	\$537,215.00 40
Monroe County Board of County Commissioners (Key West)	\$97,872.00 2
Northeast Florida Community Action Agency, Inc. (Jacksonville)	\$562,797.00 41
Osceola County Council on Aging, Inc. (Kissimmee)	\$482,089.00 34
Pinellas County Urban League, Inc. (St. Petersburg)	\$309,656.00 18
St. Johns Housing Partnership, Inc. (St. Augustine)	\$181,306.00 17
Step Up Suncoast, Inc. (Sarasota)	\$177,989.00 16
TO BE DETERMINED (Brooksville)	\$327,423.00 42
TO BE DETERMINED (Tallahassee)	\$160,667.00 14
Total:	\$5,639,696.00 456

IV.2 WAP Production Schedule

Weatherization Plans	Units
Total Units (excluding reweatherized)	456
Rewatherized Units	0
Average Unit Costs, Units subject to DOE Project Rules	
VEHICLE & EQUIPMENT AVERAGE COST PER DWELLING UNIT (DOE RULES)	

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A	Total Vehicles & Equipment (\$5,000 or more) Budget	\$0.00
B	Total Units Weatherized	456
C	Total Units Reweatherized	0
D	Total Dwelling Units to be Weatherized and Reweatherized (B + C)	456
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	\$3,846,956.00
G	Total Dwelling Units to be Weatherized and Reweatherized (from line D)	456
H	Average Program Operations Costs per Unit (F divided by G)	\$8,436.31
I	Average Vehicles & Equipment Acquisition Cost per Unit (from line E)	\$0.00
J	Total Average Cost per Dwelling (H plus I)	\$8,436.31

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
	This Year Estimate	456	29.3	13361
	Prior Year Estimate	283	29.3	8292
	Prior Year Actual	176	29.3	5157
Method used to calculate savings description:				

IV.4 DOE-Funded Leveraging Activities

<u>DOE Funded Leveraging Activities</u>
During Program Year (PY) 2024-2025, Florida will not utilize any DOE funding for leverage activities.

IV.5 Policy Advisory Council Members

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

Melvin Philpot	Type of organization: For-profit or Corporate (not a financial institution or utility) Contact Name: Phone: 4079429332 Email: melvin.philpot@duke-energy.com
Mr. Al Miller	Type of organization: Non-profit (not a financial institution) Contact Name: Phone: 8639563491 Email: amiller@alpi.org
Ms. Amy Yount	Type of organization: Local agency Contact Name: Phone: 94182728877901 Email: ayount@stepupsuncoast.org
Ms. Karen Hagan	Type of organization: Unit of State Government Contact Name: Phone: 8504120085 Email: karen.hagan@apdcares.org
Ms. Keantha Moore	Type of organization: Unit of State Government Contact Name: Keantha Moore Phone: 8502457413 Email: Keantha.Moore@DEO.MyFlorida.com

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Ms. Nacole Guyton	Type of organization: Unit of State Government Contact Name: Phone: 8507178648 Email: nacole.guyton@oel.myflorida.com
Ms. Paige Baker	Type of organization: Unit of State Government Contact Name: Paige Baker Phone: 8504142390 Email: BakerM@ElderAffairs.org
Ms. Tera Bivens	Type of organization: Unit of State Government Contact Name: Tera Bivens Phone: 8507174597 Email: Tera.Bivens@myflfamilies.com
Terry Mutch	Type of organization: Local agency Contact Name: Phone: 8502222043 Email: terry.mutch@cacaainc.org

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

Date Held	Newspapers that publicized the hearings and the dates the notice ran
04/29/2024	The Florida Administrative Register, March 11, 2024 – April 29, 2024

IV.7 Miscellaneous

The following personnel are the official Florida points of contact that will be identified in the Assistance Agreement, which is the authorizing award document issued by the DOE contracting officer:

Recipient Business Officer

The representative is authorized to act on the behalf of the Grantee to negotiate the award. All DOE official correspondence related to the award will be addressed to the Recipient Business Officer.

Megan Ah Sam, Bureau Chief

Bureau of Economic Self-Sufficiency, Division of Community Development Florida Department of Commerce

107 East Madison Street, MSC 400

Tallahassee, Florida 32399

Phone (850) 717-8467

Principal Investigator

The technical representative is authorized to act on behalf of the Grantee as project manager for the award. The Grantee's Principal Investigator is the prime point of contact for the DOE Project Officer during the project period of performance and will receive a copy of all DOE official correspondence related to the award.

Frankie Hernandez, Deputy Chief

Bureau of Economic Self-Sufficiency, Division of Community Development Florida Department of Commerce

107 East Madison Street, MSC 400

Tallahassee, Florida 32399

Phone (850) 717-8458

Policy Advisory Council:

Please see Policy Advisory Council [\[1\]](#) members profiles attached to SF424.

State of Florida Budget Authority Update

FloridaCommerce's obligations under agreements with its WAP Subgrantees are contingent upon the availability and receipt of funding as appropriated by the Florida Legislature. Funding awards and releases of funds will be tied to the Florida State Fiscal Year (July 1st through June 30th), the Legislative appropriation related thereto, and will require each Subgrantees satisfactory performance of its

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obligations set forth in its respective Subgrant Agreement, as such satisfactory performance shall be determined by FloridaCommerce. As part of the legislature process to provide budget authority FloridaCommerce request budget authority for all grants based on the forecasted award and have the opportunity to seek further budget authority in processes established by the legislature. FloridaCommerce received budget authority for all available grants and the funds are available to all subrecipients in accordance with the budget authority , which includes WAP formula and BIL>

Weatherization Readiness Fund:

The purpose for Weatherization Readiness Fund (WRF) is to reduce the frequency of deferred homes that require services that are outside the scope of weatherization before the weatherization services can commence. WRF will bring the dwelling into weatherization readiness by addressing structural and health and safety issues.

PY24 is the 3rd and final year of the grant cycle. All WRF projects must be completed within PY24 and WAP rework must be completed within PY24 or the BIL grant cycle.

The WRF will be distributed equally among the 16 Weatherization Subgrantee's and the WRF Average Cost Per Unit (WRF ACPU) will be \$8,497. **Energy Audit**

For WRF money to be expended an Energy Audit must be performed on the dwelling. 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:

1. The dwelling would normally be deferred for structural, health and safety, or other issues outside the scope of weatherization.
2. The dwelling can be made ready for weatherization with an investment of \$8,497 or less. If the dwelling cannot be made ready for weatherization, it should be deferred. If it can be made ready for weatherization, the subgrantee should notify FloridaCommerce in writing of their plans to use WRF money on the dwelling.

Allowable Measures

The nature of the repairs may fall under the following categories according to WPN 23-4: Weatherization Readiness Funds – Expansion of Scope.

- aX. Roof Repair
- aX. Wall Repair (Interior or Exterior)
- aX. Ceiling repair
- aX. Floor Repair
- aX. Exterior drainage repairs (e.g., gutters)
- aX. Plumbing repairs
- aX. Electrical repairs
- aX. Cleanu p or remediation beyond typical scope of WAP
 - Lead Paint
 - Asbestos (Confirmed or suspected, including vermiculite), mold and/or moisture
 - Debris
 - Pests or feces removal

Any other possible issue or repair not mentioned above will require the Subgrantee to obtain permission from Grantee prior to utilizing the WRF.

LIHEAPWAP funds may be utilized to leverage

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WRF activities to bring a dwelling to weatherization readiness status.

The Florida WAP will track these funds for each building and unit, and at a minimum, capture measures/repairs and associated costs, for reporting purposes. DOE WAP is subject to the Paperwork Reduction Act and as such Florida WAP's final tracking requirements and data collection will follow the appropriate Information Collection Request (ICR) process to gain approval.

Readiness Timeframe

The process and timeframe listed should be used as a guide when completing the readiness procedures.

Step 1: Subgrantee conducts a home evaluation and determines that the home is not ready for weatherization (deferral).

Step 2: Subgrantee estimates the repair costs to determine if repairs and costs fall within the guidelines of the repair program.

Step 3: Subgrantee prepares and submits an approval form with supporting documentation (i.e., pictures, estimates/pre-work orders, scope of work,

copy of deferral tracker/deferral documents) to FloridaCommerce for review and approval.

Step 4: FloridaCommerce reviews and requests more information as required, and then provides approvals or denials where applicable.

Step 5: Subgrantee will ensure readiness repair work is completed prior to weatherization.

Average time for weatherization readiness may vary depending on the work being completed, however, it should not take more than five (5) days to ready a home for weatherization. FloridaCommerce recognize that PY24 is the 3rd and final year of the cycle and will ensure that subrecipients receiving WRF funds complete their weatherization projects on or before the end of PY24 grant cycle or PY24 BIL cycle.

Restrictions

- WRF should not be utilized for homes that exhibit dangerous conditions that may pose a significant threat, endangerment, or create a significant health concern to the Subgrantee's staff, contractors, and/or crews. This includes:

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- If pollutants pose a risk to workers and removal cannot be performed or is not allowed by the client. Pollutants include Formaldehyde, Volatile Organic Compounds (VOCs), and other Air Pollutants.
- Dangerous conditions exist due to high carbon monoxide levels in combustion appliances and cannot be resolved under existing health and safety measures.
- The property has been condemned or electrical, heating, plumbing, or other equipment has been "red tagged" by local or state building officials or utilities.
- Any WRF ACPU at the end of the year superseding \$8,497.00 will not be permitted.
- Dwellings with issues or repairs that aids the purpose of a sale will not be permitted.
- Readiness funds can only be used for new weatherization assistance applications (those received after the current program year). Any application deferred prior to the commencement of the new program year will not access WRF.
- Federal regulation stipulates that Readiness Funds cannot be transferred to other 'program operations' funds. WRF must only address necessary repairs (e.g., Health and Safety issues, structural) in dwellings that have been deferred from receiving weatherization services.
- Weatherization readiness will not be performed if:
 - There is presence of illegal presence or use of any controlled substance in the home during the process.
 - The client refuses major measures which would result in a "partial" completion of the readiness process.

PY24 is the 3rd and final year of the grant cycle. All WRF projects must be completed within PY24 and WAP rework must be completed within PY24 of the BIL grant cycle.

Monitoring

The WRF will be monitored through four (4) formats: The Weatherization Readiness Fund (WRF) Request Form, Energy Audits & Deferral Tracking, Monthly Reimbursement Processes, and Yearly Monitoring. In accordance with the Paperwork Reduction Act, FloridaCommerce's monitoring, and evaluation process follows the appropriate Information Collection Request (ICR) process to gain the approval required.

1. The Weatherization Readiness Fund

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(WRF) Request Form. Once it has been determined that WRF will be used on a dwelling, the Subgrantee will document the actions to be taken to make the dwelling ready for weatherization. To assist with this process, the WRF form was developed to capture all WRF requests made by the Subgrantee, to monitor the total number of homes weatherized using readiness funding, the nature of repairs being conducted, and the cost associated with each repair.

Once completed by the Subgrantee, the form will be sent to FloridaCommerce for approval, and upon approval, work will commence. A copy of the approved WRF form should be placed on the client's file. A version is also maintained by the contract manager.

Upon readiness work completion, the dwelling must receive an inspection to determine if weatherization work can commence. The inspection will also be documented in the Subgrantee's client files as well as in the Subgrantee Enterprise Resource Application (SERA). The contractor that performed the readiness work will not be paid until their work receives a passing inspection. Once the readiness work is completed and the contractor has been paid, the Subgrantee uploads the information into SERA and notifies FloridaCommerce.

2. Energy Audits. For WRF to be expended, an Energy Audit must be performed on the dwelling. If after the audit the unit is determined eligible for DOE weatherization, with an SIR of 1.0 or greater, the Energy Auditor must determine if:

- a. The dwelling would normally be deferred for structural, health, and safety, or other issues as outlined under allowable measures.
- b. The dwelling can be made ready for weatherization with an investment of \$8,497. If the dwelling cannot be made ready for weatherization, it should be deferred. If it can be made ready for weatherization using readiness funds, the WRF Form should be completed. The deferral tracker, will also be utilized to track this process.

3. Monitoring and evaluation will also be accomplished through the monthly reimbursement process. Subgrantees will be required to indicate the homes where WRF was utilized in their Financial Activity. The WRF ACPU

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will also be monitored at that time.

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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

All dwelling units to be weatherized shall be determined eligible in such a manner to ensure that each weatherized unit meets the qualifications of 10 CFR 440.22 "Eligible Dwelling units." Eligibility may be categorical or traditional.

Categorical Eligibility

Categorical eligibility applies when one or more persons living in the dwelling unit has received cash assistance payments under Title IV or XVI of the Social Security Act, or applicable state or local law at any time during the 12 months preceding the determination of eligibility for weatherization assistance; or one or more persons in the unit is eligible for assistance under the Low Income Home Energy Assistance Act of 1981, provided that such basis is at least 200 percent of the poverty level.

Additionally, categorical eligibility will expand to include U.S. Department of Housing and Urban Development's (HUD) means-tested programs' income qualifications at or below 80 percent of Area Median Income. (Examples of HUD program but are not limited to Community Development Block Grants (CDBG), HOME Investment Partnerships Program (HOME), Lead Hazard Control & Healthy Homes Program (OLHCHH), etc.).

There should be certification that applicants have met the income requirements of HUD means-tested programs through mechanisms including, but not limited to, applicant documentation, interagency lists of recipients, shared system databases, etc. Method of verification of eligibility must also be included in the client file.

The beneficiaries of this change include: 1) DOE WAP Grantees and Subgrantees – allowing qualified households for means-tested HUD Programs to be categorically eligible for the WAP. 2) Low-income eligible households being served by removing the additional burden of applying for and submitting the same documentation to multiple programs to receive comprehensive services.

Traditional Eligibility:

Traditional eligibility applies to any household whose income is at or below 200 percent of the poverty level determined in accordance with criteria established by the Director of the Office of Management and Budget for the 12 months preceding the application.

All income documentation/information must be recertified after 180 days of the original income verification date. If it is determined that a Subgrantee weatherizes a dwelling of a household that does not meet the income eligibility guidelines in WAP, that Subgrantee will be required to reimburse WAP the total cost of the weatherization activity and generated Program Support (PS).

Describe what household eligibility basis will be used in the Program

A household shall be defined as a family unit meeting the qualifications listed above to qualify for weatherization. In Florida, any household meeting either categorical or traditional eligibility would be eligible to receive WAP benefits.

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

Florida will follow the guidance provided by the U.S. Department of Health and Human Services (HHS) under the Low-Income Home Energy Assistance Program (LIHEAP) available at:
[LIHEAP IM HHS Guidance on the Use of Social Security Numbers \(SSNs\) and Citizenship Status Verification](#)

V.1.2 Approach to Determining Building Eligibility

Procedures to determine that units weatherized have eligibility documentation

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Single-Family dwellings with clear proof of ownership are eligible units for weatherization. The Subgrantee is required to collect proof of ownership documentation from applicants and maintain this proof in the client's file. FloridaCommerce recognize that PY24 is the 3rd and final year of the grant cycle and will ensure that subrecipients receiving WRF funds complete their weatherization before the end of the PY24 grant cycle or the PY24 BIL cycle.

No dwelling unit may be weatherized without documentation that the dwelling unit is an eligible unit. During the initial client application process, the application must provide evidence or income documentation satisfactory to the Subgrantee outreach worker that the household meets the eligibility requirements. The documentation must be maintained in the client file and made available for inspection by the Subgrantee and state staff. In accordance with the U.S. Department of Energy (DOE) Weatherization Program Notice 21-3, FloridaCommerce will follow the calculation method as outlined in Florida Policy & Procedure manual. The method of calculation shall be determined by the Grantee and will be applied uniformly by all Subgrantees.

Determine eligibility based on owner documentation and income document for renters.

FloridaCommerce requires the subgrantee obtain applications from renters that have applied for weatherization services before investing any funds in the project and to determine eligibility to weatherization services under 10 CFR Part 440.22. FloridaCommerce requires that subgrantees enter into a written agreement with owners of rental buildings that will receive weatherization assistance, using a form provided by FloridaCommerce and located in the WAP Policy and Procedures Manual under 'WAP Landlord Permission to Perform Assessment and Inspections for Rental Units Agreement,' (Landlord Agreement) before any funds are invested in a project. The agreement names the tenants as third-party beneficiaries of the agreement, to establish certain rights.

In accordance with Federal rules and guidance intended to limit undue or excessive enhancement of the value of rental units resulting from investment of weatherization funds, FloridaCommerce may require landlords to contribute to the cost of the weatherization work scope as a condition of receiving assistance. Furthermore, naming the tenant as a third- party beneficiary provides the tenant with recourse in the legal system if a building owner violates the terms of the agreement.

FloridaCommerce renter procedure will require that:

- Written permission of the building owner is received before any work commences;
- Benefits of weatherization assistance primarily accrue to the low-income tenants residing in the rental units;
- Tenants and owners are notified in writing of their rights and the procedures tenants may follow to complain or appeal should improper rent increases occur;
- No undue or excessive enhancement of the value of the assisted building results from installation of weatherization materials with weatherization funds;
- Landlords agree in writing to restrictions on their use of the building after weatherization funds are invested;
- Landlords participate in the financing of weatherization activities, if applicable; and,
- And other conditions listed under the Landlord Agreement.

For more information on building eligibility limitations and weatherization of rental units, see Chapter 3. Section 3.B, and Chapter 4. Section 6 of the WAP Policy and Procedures Manual.

Describe Reweathering compliance

Section 1011(h) of the Energy Act of 2020 and 42 U.S. Code § 6865(c)(2), as amended, removed the re-weatherization date, September 30, 1994, and created a "rolling" option. Re-weatherization is defined as "*Dwelling units weatherized (including dwelling units partially weatherized) under this part or under other Federal programs (in this paragraph referred to as 'previous weatherization'), may not receive further financial assistance for weatherization until the date that is 15 years after the date such previous weatherization was completed.*" The priority is to serve dwelling units that have not received prior services. All dwelling units eligible for re-weatherization must have an audit performed using DOE-approved energy audit tool, National Energy Audit Tool (NEAT), or the Mobile Home Energy Audit Tool (MHEA), to justify the cost of the measures being installed. Eligible dwelling units may not receive weatherization services again unless such dwelling unit has been damaged by fire, flood, or act of God and repair of the damage to weatherization materials is not paid for by insurance or other federal funds such as the Federal Emergency Management Agency (FEMA).

Describe what structures are eligible for weatherization

Structures eligible for weatherization include single family, manufactured housing, and multi-family housing. All structures must be stationary and have a specific mailing (street) address.

Nonstationary homes such as campers and RVs are not eligible to receive weatherization services. The use of a post office box in lieu of a specific mailing address for a nonstationary home will not be accepted.

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'Tiny homes' have no formal definition, but are classified as 'single-family homes, typically occupying 400 square feet or less.' Stationary tiny homes, with a specific mailing address, are eligible to receive weatherization services.

Additionally, every dwelling weatherized must meet both the client eligibility and the building eligibility requirements. Structures are ineligible for weatherization funds if they are condemned, scheduled for demolition, or designated for acquisition or clearance by federal, state or local program within 12 months from the date of weatherization scheduled completion.

If conditions exist that preclude the weatherization of the structure, a brief written description of the conditions should be supplied to the client. This notification should be coupled with the notification that weatherization assistance is deferred until such time that the problem conditions have been resolved. The Subgrantee should inform the client of a "reasonable" amount of time for the resolution of the problem conditions. (See Deferral Standards).

Describe how Rental Units/Multifamily Buildings will be addressed

Rental Units:

Weatherization of rental units is an allowable activity. There are specific guidelines that are addressed in the Florida WAP Manual, Procedures and Guidelines section, and WPN 22-13 Weatherization of Rental Units. These include:

1. After the client application has been received and it is determined that the household meets the eligibility requirements, the owner must provide proof of ownership (a copy of the deed or property tax receipt).
2. The property owner must sign the Landlord Agreement Form (LAF) and Permission to Enter Premises (PEP) form. The Landlord Agreement Form stipulates that:
 - o The benefits of the services accrue primarily to the tenants.
 - o For a period of 12 months, the tenant will not be subject to a rent increase (unless demonstrated that they are related to other matters not related to the weatherization work performed).
 - o A tenant rent increase complaint may be appealed by the owner.
 - o No undue enhancements shall occur to the value of the dwelling unit.
 - o Encourage financial participation by the owner if feasible.
3. In cases of rental units in multi-family buildings, a 66 percent, or 50 percent rule for determining income eligibility requirements must be followed per 10 CFR 440.22(b)(2).

Multi-Family Units:

Multi-family units (five or more units) require case-by-case approval from DOE. Multi-family units (duplexes, three, and four-unit buildings) can be completed once specific eligibility in multifamily is addressed per 10 CFR 40.22(b)(2)[\[1\]](#). These units will be monitored using the same auditing tool Florida uses for single-family auditing[\[2\]](#).

Florida requirements for determining eligibility of multi-family dwellings follow DOE guidance:

WPN 22-12, Multifamily Weatherization

Multifamily projects being considered for weatherization must be confirmed to meet the 66 percent rule for determining eligible dwellings or, in special cases, the 50 percent rule. The buildings that are subject to the 50 percent threshold are duplexes, four-unit buildings, and certain eligible types of large multi-family buildings. In the final rule published on December 8, 2000, DOE provided guidance on what types of large multi-family buildings may be subject to the 50 percent threshold. (65 Fed. Reg. 77210, Dec. 8, 2000.)

The same assessment of property/unit requirements utilized for single family rental units (PEP and BOA/LAF) will apply to any multi-family project that a Subgrantee may consider weatherizing. Subgrantees considering undertaking a multi-family project within their service area must contact the state WAP office for any additional guidance and then submit the application documentation for review. Then the package will be forwarded to DOE for review and approval. A multi-family project cannot proceed until approved by DOE and then by the state WAP office.

FloridaCommerce follows guidance offered in WPN 22-5 that streamlines the qualification of certain HUD multi-family properties for weatherization work, including streamlining income eligibility determination and ensuring that benefits accrue primarily to the low-income residents.

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[1] 50 percent of the dwelling units in the building are eligible dwelling units or will become eligible dwelling units within 180 days under Federal, State, or local government program for rehabilitating the building or making similar improvements to the building.

[2] V.5.2 ENERGY AUDIT PROCEDURES, page 49

Describe the deferral Process

The Florida WAP may elect to defer a dwelling from receiving weatherization services where health and safety hazards exist for WAP staff, contractors, clients or where conditions prevent the safe and effective implementation of weatherization measures. The decision to defer work in a dwelling, or in extreme cases, provide no weatherization of weatherization measures. This does not mean that assistance will never be available, but that work must be postponed until the problem can be resolved. Information for making this determination may become evident during the eligibility process, during the audit, or after work has started.

Conditions that may cause a dwelling to be deferred may include, but are not limited to, the following:

- The dwelling was weatherized in the past 15 years.
- The dwelling unit is vacant.
- The dwelling unit is for sale.
- The dwelling unit is scheduled for demolition.
- When there are minor children in the dwelling, but no adult client or adult agent of the client at the time of the estimate or at any other time Subgrantee personnel must enter the dwelling.
- The eligible member of the household moves from the dwelling unit where weatherization activities and services are in progress. In such a case, the Subgrantee must determine whether to complete the work and the circumstances must be documented in the client file.
- The client has known health conditions that prohibit the installation of insulation and other weatherization materials. When a person's health may be at risk and/or the work activities could constitute a health or safety hazard, the occupant at risk will be required to take appropriate action based on severity of risk. Temporary relocation of at-risk occupants may be allowed on a case-by-case basis. Failure or the inability to take appropriate actions must result in deferral.
- The dwelling unit is deemed by the auditor to have irreparable conditions that pose a threat to the health or safety of the crew or subcontractor.
- The mobile home is improperly installed (for example, inadequate supports).
- The dwelling unit is uninhabitable (for example, a burned-out apartment).
- There are health or safety hazards that must be corrected before weatherization services may begin that include, but are not limited to:
 - The presence of animal feces and/or other excrement.
 - Disconnected wastewater pipes.
 - Hazardous electrical wiring; or
 - Unvented combustion appliances.
- The building structure or its mechanical systems, including electrical and plumbing, are in such a state of disrepair that failure is imminent, and the conditions cannot be resolved cost-effectively.\
- The house has sewage or other sanitary problems that would further endanger the client and weatherization installers if weatherization work were performed. Deferral may be necessary in cases where a known agent (odors, mustiness, bacteria, viruses, raw sewage, rotting wood, etc.) is present in the home that may create a serious risk to occupants or weatherization workers.
- The property has been condemned or electrical, heating, plumbing, or other equipment has been "red tagged" by local or state building officials or utilities.
- Moisture problems, mold, and/or mildew are so severe they cannot be resolved under existing health and safety measures and with minor repairs.
- The home has drainage related conditions (gutters, downspouts, extensions, flashing, sump pumps, landscape, etc.) that may create a serious health concern and require more than incidental repair.
- Dangerous conditions exist due to high carbon monoxide levels in combustion appliances and cannot be resolved under existing health and safety measures.
 - Dangerous conditions exist due to major gas leak(s) and cannot be resolved under existing health and safety measures.
 - If pollutants pose a risk to workers and removal cannot be performed or is not allowed by the client. Pollutants include formaldehyde, Volatile Organic Compounds (VOCs), and other air pollutants.
 - When the extent and condition of lead-based paint in the house would potentially create further health and safety hazards.
 - Infestation of pests, including rodents, vermin, fleas, and roaches, may be cause for deferral where it cannot be reasonably removed or poses health and safety concern for workers.
 - If there is a dangerous dog or other animal that poses a threat to weatherization workers.
 - Improperly stored chemicals, combustible materials, or other fire hazards that present a danger to the occupants or workers.
 - The home is cluttered to the extent that mobility and the ability to perform weatherization work is hindered and obstacles create a safety hazard.
 - If the home is being remodeled or rehabilitated and the weatherization work is not coordinated with that effort.

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- Obvious discrepancies are found between the information supplied by the client on the application and observed conditions at the time of weatherization. The Subgrantee must resolve these discrepancies before weatherization work can continue.
- The client is uncooperative with the Subgrantee, either in demanding that certain work be done and refusing higher priority work that is needed, by being abusive to the work crew or subcontractor, or by being unreasonable in allowing access to the unit. Every attempt should be made to explain the program and the benefits of the work. If this fails, work should be suspended, and FloridaCommerce should be consulted.
- If, at any time prior to the beginning of work (materials installed in a unit), the Subgrantee determines that the client is no longer eligible or Subgrantee personnel believe that circumstances may have changed, the unit shall not be weatherized until updated information can be obtained from the client.
- The presence of live knob-and-tube wiring in areas where weatherization work must be performed.
- The illegal presence or use of any controlled substance in the home during the weatherization process.

Deferral Procedures:

Deferrals During Audit:

If an auditor arrives at a home, begins to review the dwelling, and determines it should be deferred prior to concluding the audit, the auditor shall immediately contact the Subgrantee Weatherization Director to describe the situation and ask for guidance. If, in the auditor's judgment during the audit, they determine that the dwelling should be deferred for a problem likely and/or easily remedied using the Weatherization Readiness Fund, or otherwise, and that the dwelling will eventually be weatherized, the audit may continue. However, the auditor shall immediately contact the Subgrantee Weatherization Director to describe the situation and ask for guidance. If possible, the Weatherization Director (or their assignee) may meet with the auditor to discuss the situation further and consider way to continue and avoid deferral. No dwelling may be deferred without approval from the Subgrantee Weatherization Director. If possible, all areas of the home should be inspected to identify all deferral issues to avoid multiple deferrals. Photos of all deferral conditions should be taken and included in the client file with documentation.

If the dwelling must be deferred, the auditor shall provide the homeowner with a brief statement (when feasible) of why they are recommending a deferral. The auditor will then report the recommended deferral to the Subgrantee Weatherization Director, who will assess the documentation (photos, description of the situation), approve, or disapprove the deferral, and notify the homeowner in writing of the deferral decision.

If a deferral occurs before the audit is completed, the unit still may be eligible for payment. If the cause of the deferral is resolved, the Subgrantee shall assign the same auditor to the unit to conclude the audit. If a dwelling is deferred after the audit is completed, payment may not be made unless and until the "Administrative Procedures to be Followed for Deferred Units" below is concluded.

Deferral at Time of Measure Installation:

Any crew or contractor who arrives on site and discovers what they believe to be a cause for deferral shall immediately contact the Subgrantees Weatherization Director to discuss the situation and determine a course of action. No work shall be done on the dwelling until the issue is resolved.

If the unit is to be deferred, the contractor shall provide the homeowner with a brief statement (when feasible) of why they are recommending deferral before departing. The contractor will then report the recommended deferral to the Subgrantee Weatherization Director, who will assess the documentation (photos, description of situation), approve, or disapprove the deferral, and notify the homeowner in writing of the deferral decision. The contractor shall then be entitled to payment for work completed prior to the deferral.

Administrative Procedures to be followed for Deferred Units:

The Subgrantee shall make every effort to bring homeowners back into the program. First, the Weatherization Readiness Fund (WRF) should be considered prior to deferring a home. These funds will be used to structurally, and otherwise, equip the home for weatherization. If the Readiness Funds are insufficient to repair the home, install health and safety measures, or the deferral is as a result of a client's uncooperativeness, the Subgrantee shall:

1. Direct a letter to the homeowner informing them the dwelling has been deferred and asking them to correct the deferral conditions and contact the Agency when work is complete. The agency should give the client 60 days following a deferral letter to correct the issue(s). The letter should refer the client to any resources that may assist with the deferral conditions, as well as information on their right to appeal.
2. If no action is taken by the homeowner, a second letter will be sent to the client by certified mail after the 60 days, informing them that they must contact the Subgrantee within 30 days to be eligible for weatherization services.
3. If no response is received to the certified letter, the unit is removed from further consideration by WAP at the current time.
4. If at any time the homeowner states that they cannot or will not make the needed repairs, a final letter shall be sent to the homeowner informing them that they have been removed from the program, and they may not participate in WAP unless and until the identified conditions have been remedied and an updated application is submitted.
5. If the client application exceeds one year, then requalification for WAP eligibility based on updated information and documentation is necessary.

All letters and documentation of efforts to contact or help the homeowner shall be kept in the client's file by the Subgrantee.

When possible, subgrantees are encouraged to make referrals or collaborate with other programs. However, it is the client's responsibility to correct the condition(s)

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causing the deferral for weatherization services to proceed. When the conditions causing the deferral are addressed, if six months have passed since the last certification, the homeowner will be required to recertify. Clients are asked to contact the subgrantee to reevaluate the home as soon as the conditions that caused the deferral have been addressed. 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.

Notification and Appeal:

Households shall be informed in writing by the Subgrantee when services are deferred based on the deferral guidelines above. The deferral notice will include instructions to remedy the conditions that led to the deferral or to appeal the deferral based on the 'Complaints and Dispute Resolution' policy. (Chapter 4. Section 7 of the Florida WAP Manual).

In unusual situations not covered above or where other problems of a unique nature exist, FloridaCommerce should be consulted.

If obvious discrepancies are found between the information supplied by the client on the application and observed conditions at the time of weatherization, the Subgrantee must resolve these questions prior to weatherization. Some examples of discrepancies are an obvious change in the client's income (e.g., an unemployed client who is now back to work), a difference in the number of persons living in the dwelling unit (fewer persons than listed, a person or persons not accounted for who may have income), or evidence of an unreported business being conducted in the unit, etc.

As stated above, clients will receive a letter listing the corrections that need to be made to avoid deferral. After 60 days, if no action is taken by the client, a second letter will be sent via certified mail instructing the client to respond to the Subgrantee within 30 days to remain eligible for Weatherization services. If after this 90-day period no response is received from the client, they are no longer considered for Weatherization services and must reapply to receive benefits. If the client makes the necessary corrections to avoid deferral, they are given top priority, and do not need to reapply for benefits. Deferral and Referral Tracking

Subgrantees will record deferrals and referrals on the attached Deferral/Referral Tracking Sheet. This tracking mechanism will allow for future evaluation of funding and leveraging activities. Subgrantees will submit completed tracking sheets to FloridaCommerce contract managers quarterly.

Deferral and Referral Tracking

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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 Florida's Federally Recognized Tribes whose household meets the eligibility requirements are eligible to receive benefits equivalent to the assistance provided to other low-income persons within the state.

Assistance is made available to all low-income residents of the state without regard to tribal organization status, to the extent that funding is available.

V.2 Selection of Areas to Be Served

Services will be available in each of Florida's 67 counties. The weatherization funds are allocated to the local Subgrantee based on an allocation formula comprised of the low-income population of the state against the low-income population of each county, the average number of heating and cooling days in each of the two climate zones, and the overall average energy cost per kilowatt.

Allocation of funds to Subgrantees and across budget categories will be based on the base formula.

The WAP Subgrantee Policy and Procedures Manual describes the state's response to Subgrantee noncompliance, including recoupment or reduction of funding, Subgrantee probation, and Subgrantee termination.

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Suwannee River Economic Council has relinquished the administration of the program as a Weatherization provider for the following counties: Bradford, Columbia, Dixie, Gilchrist, Hamilton, Lafayette, Madison, Suwannee, Taylor, and Union. Short term coverage for these counties will be provided by Capital Area Community Action Agency. FloridaCommerce will initiate efforts to procure, select and designate a WAP provider for these counties in spring of 2025. A public hearing will be conducted as part of these efforts to designate a new permanent WAP provider for this area.

Tampa-Hillsborough Action Plan was de-designated by FloridaCommerce on November 1, 2022. The agency previously served Polk and Hillsborough Counties. Short term coverage for Polk and Hillsborough counties will be provided by Mid Florida Community Services who changed their name to You Thrive Florida in May 2024. FloridaCommerce will initiate efforts to procure, select and designate a WAP provider for these counties in spring of 2025. A public hearing will be conducted as part of these efforts to designate a new permanent WAP provider for this area.

Redistributing provision:

FloridaCommerce retains the right to allow for reallocation of funds to Subgrantees and across budget categories using the same formula as originally proposed or any other funding plan that meets the needs of targeted Florida citizens. Active management and reallocation allow the grant to be fully expended during the budget period. FloridaCommerce, at its discretion, may reallocate funding to an agency or agencies that demonstrate a high number of weatherized dwellings, burn rates and expenditures.

V.3 Priorities

Once eligibility has been determined, the Subgrantee must abide by the following client priority policy.

Applications should be assessed with several priorities based on information taken from the application. In accordance with 10 CFR 440.16, priority must be given in identifying and providing weatherization assistance to households where one or more of the following exist:

1. High energy usage;
2. High energy burden;
3. Elderly household member(s) who are 60 years or older;
4. Disabled household member(s);
5. Household member(s) under the age of 18.

Households that do not meet at least one of the priority categories may only be served if all eligible priority households in the Subgrantee's territory have been served. Within the above listed priority, Subgrantees may choose the order in which households are served. The number of preference points determines client position on the waiting list. The person with the most points will be placed at the top of the waiting list. Lower priority ranked, income eligible households may be served later in the program year or when funding is available. Priority systems must be applied equally to both renter and owner-occupied dwellings.

Subgrantees may choose to consider using the oldest application approval date for positioning applicants with priority points. An application with at least one priority point may be moved up on the list when working in the same area to save travel time.

Subgrantees that choose to develop their own methods for prioritizing clients must still adhere to federal regulation 10 CFR 440.16(b), develop written procedures, and seek approval of the methodology from FloridaCommerce. Each Subgrantee must develop a client facing priority policy so that clients are able to understand the selection process. This policy will be reviewed during monitoring.

V.4 Climatic Conditions

Climate and demographics formulas are utilized to determine the percentage of allocation needed for each county in Florida. An 'Average Degree Days' data is utilized to determine cooling degree days and heating degree days that span five years.

Counties with higher degree days and more eligible households receive increased funding. As climate and population changes occur over time, allocations are intentionally lagged to reduce the shock in the changing budget year-to-year. A hold harmless formula is used to prevent large changes year-to-year for

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subgrantees. The formula considers 80 percent of the previous year allocation, which is historically derived, and 20 percent is climate and population derived. The formula takes the percentages to determine the total allocation for the Subgrantees.

The below table shows 'Degree Days' data collected over the last five years. Data collected through Degreedays.net.

City	Cooling Degree Days	Heating Degree Days
Tallahassee	3,026	1,436
Jacksonville	3,429	815
Pensacola	3,219	1,196
Orlando	3,804	515
Sarasota	4,037	403
Florida City	5,063	104

Data from Degreedays.net

The climatic parameter varying from its long-term mean will affect the number of Heating Degree Days (HDD) and Cooling Degree Days (CDD) in Florida. This will change which measures are most cost-effective to be performed on eligible weatherization dwellings. During our sub-grantee annual audit, each client file is reviewed to ensure

that the closest weather station to its location is selected.

V.5 Type of Weatherization Work to Be Done

V.5.1 Technical Guides and Materials

During the Formula cycle, all Florida technical guides and materials will meet the specifications, objectives, and desired outcomes outlined in the Standard Work Specifications for Home Energy Upgrades (SWS).

The following guides will be utilized by all Subgrantees and as applicable, contractors in performing weatherization activities:

1. Florida WAP Policy and Procedures Manual (P&P)
2. SWS/Florida Field Guides (SWS/FFG)
 - a. Single Family Homes
 - b. [Standard Work Specification-Aligned Field Guide](#)
 - c. Manufactured Homes
 - d. [Standard Work Specification-Aligned Field Guide](#)
 - e. Multi-family Homes
 - f. NEAT and MHEA
 - g. Florida Weatherization Health and Safety Plan
3. Florida Weatherization Program Notices
 - a. Quality Control Inspection (QCI) report
 - b. Monthly reporting forms
 - c. Contractors' agreement language
 - d. DOE-Approved Formula Plan
 - e. Subgrantee WAP contractual agreement attachments – *(Scope of Work, Reporting, Record Keeping and Special Conditions, as applicable).*

Communication of guidelines and standards:

During the Formula cycle, all Subgrantee contracts and Subgrantee vendor contracts will contain language that specifically includes adherence to the Field Guide and SWS requirement, Policy and Procedures Manual, Health and Safety Plan and Program Notices. Work performed on dwellings shall be completed in accordance with the SWS/FFG, the Florida Weatherization Policy and Procedures Manual, Weatherization Priority List, Supporting Weatherization Program Notices, along with any supplemental FloridaCommerce and USDOE guidelines. As stated in Paragraph G of the Scope of Work of the WAP agreement, "Subgrantee shall ensure that all installed weatherization materials meet the materials standards taken from Appendix A of 10 C.F.R. part 440, be of good quality, and be installed in a safe, cost-effective manner."

All work being performed by Florida WAP will be in accordance with the DOE-approved energy audit procedures and 10 CFR 440 Appendix A. In addition to materials approved in 10 CFR Appendix A, FloridaCommerce has been approved to utilize Light Emitting Diodes (LED) as an energy conservation measure in Florida.

- a. The Florida WAP Policy and Procedures will include sections for quality work standards, inspection compliance and Quality Control Inspector qualifications,

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training requirements, and certification. By signing the FloridaCommerce agreement, Subgrantees are acknowledging receipt of all technical manuals, policies and protocols.

- b. The state will require written Subgrantee communication and verification to ensure that the requirements are understood. The state will require the Subgrantee to provide written verification from all vendors of the SWS.

The Standard Work Specifications (SWS) was updated in Program Year 2021 (PY21) and was rebranded as FFG. DOE accepted the FFG in November 2021.

The FFG was distributed through Statewide Weatherization Program Notice, and a copy was provided to the network. Additionally, the FFG has also been posted on FloridaCommerce’s website for easy access to the network at [https://www.floridajobs.org/ weatherization- assistance-program](https://www.floridajobs.org/weatherization-assistance-program) under “Retrofitting Florida: Standard Work Specifications- Aligned Field Guide”.

Field guide type approval dates

Single-Family	11/08/2021
Manufactured Housing	11/08/2021
Multi-Family	To be determined

Field guide types approval dates

Single-Family: 11/8/2021
Manufactured Housing: 11/8/2021
Multi-Family:

V.5.2 Energy Audit Procedures

Audit Procedures and Dates Most Recently Approved by DOE

Audit Procedure: Single-Family Audit Name: Other (specify) Florida Weatherization Assistance Program, Single Family Site-Built Housing based on NEAT, submitted for Energy Audit Procedure Approval, March 20, 2020; Provisional Approval September 22, 2020. Approval Date: 9/22/2020

Audit Procedure: Manufactured Housing Audit Name: Other (specify) Florida Weatherization Assistance Program, Manufactured Housing based on MHEA, submitted for Energy Audit Procedure Approval, March 20, 2020; Provisional Approval September 22, 2020. Approval Date: 9/22/2020
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Audit Procedure: Multi-Family Audit Name: Other (specify) Multi-family units will represent less than 20 percent of all units weatherized during any program year: FloridaCommerce and all its Subgrantees will submit multi-family projects to DOE for approval on a case-by-case basis. Approval Date:

Comments

Florida is committed to resubmitting energy audit procedures to DOE for approval every five (5) years, with the understanding that sufficient lead time is required for the approval process. The current NEAT and MHEA procedures were last approved by DOE on September 22, 2020, and will expire on September 22, 2025. Florida Subgrantees will conduct a full site-specific energy audit utilizing the Weatherization Assistant software. Subgrantees will complete an assessment of the central heating and cooling unit, water heater, and building’s characteristics. Subrecipients must update fuel, supply, and electricity cost libraries in the Weatherization Assistant, at minimum, every 12 months. More frequent price updates are warranted when prices are impacted by supply chain interruptions, inflation, or other external factors like natural disasters. Regular management of libraries improves accuracy of SIR prediction, allowing agencies to better serve clients. For multi-family units, FloridaCommerce will ensure that all WAP staff will have the required training and any proposed weatherization of multi-family units will be

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approved by DOE before work commences.

Multi-Family Audit:

Florida historically has fallen below the DOE 20 percent threshold of weatherizing multi-family dwelling units and does not currently have a DOE-approved audit and procedures for multi-family buildings. However, in the event a Subgrantee decides to undertake a multi-family building project for weatherizing, it will:

- a. Follow the multi-family dwellings criteria outlined in Section V.1.2 Approach to Determining Building Eligibility.
- b. Conduct the building assessment (diagnostic testing and inspection) and have a qualified energy auditor complete a DOE-approved energy audit (see WPN 19-4 for DOE-approved multifamily energy audits) to determine the energy conservation measures that should be implemented through weatherization.
- c. Submit to the state WAP office all documentation and material from the assessment and audit, including the recommended scope of work and installation procedures.

After the state WAP office assessment is completed, it will forward that proposal to its DOE Project Officer for review and approval. Multi-family projects will be assessed on a case-by-case basis.

Weatherization Assistant Version 10 Transition:

In December 2022, FloridaCommerce formally notified DOE Project Officers and Oak Ridge National Laboratory (ORNL) of the intent to transition to Weatherization Assistant Version 10, per WAP Memo 091. The transition will be fully completed by the beginning of PY2024 (July 1st, 2024). FloridaCommerce is in the process of training the weatherization staff and Subgrantees, tested the website, updated the Cost Libraries, and will conduct data migration in time for the PY2024 deadline. An updated NEAT and MHEA Manual that incorporates version 10 of the weatherization assistant tool is being developed and will be submitted to DOE for approval.

V.5.3 Final Inspection

DOE requires that Quality Control Inspectors (QCI) working for WAP possess the knowledge, skills, and abilities in the National Renewable Energy Laboratory (NREL) Job Task Analysis for Quality Control Inspectors. This requirement applies to all individuals, including final inspectors, who perform an evaluation and approve work performed in homes.

The QCI will ensure that the weatherization services were completed properly and that all measures called for in the assessment, work orders, and change orders have been installed and completed in a quality workmanship like manner and are in accordance with the priorities determined by the audit procedures, standard work specifications, and all other Florida WAP requirements.

Florida Subgrantees may apply one of the two options available for meeting the QCI requirement:

- a. Independent QCI (Subgrantee staff or outsourcing)
- b. Independent Auditor /Quality Control Inspector

No dwelling unit will be considered as completed and reported to FloridaCommerce until:

- The QCI is performed (either by a Subgrantee staff who is certified to perform the QCI or through an outsourced entity approved to conduct the QCI by FloridaCommerce).
- The QCI individual completes the QCI Report and both the QCI individual and whomever performed the initial inspection and diagnostic testing on the dwelling signs this report.
- A copy of the QCI Report is complete and the dwelling unit is ready for submittal to FloridaCommerce.
- An approved deferral was used on the home due to client noncompliance.

The WAP production spreadsheet that is submitted by Subgrantees with each monthly request for reimbursement, captures the name of the QCI, status of QCI certification, date the QCI certification expires and whether the QCI is a contractor. This report is reviewed by the contract manager monthly and maintained in the Subgrantee's file. QCIs' certifications are also captured in the Training Plan submitted by the Subgrantee once a year. This plan will outline the QCI training schedule, the type of training required, and the certification that will be obtained. The WAP or Contract Manager will be able to track certifications while assessing training needs.

Quality Control Inspectors are individuals who are not involved in the prior work inspected as the energy auditor/assessor, a member of the crew or affiliated with a contractor hired to install any weatherization item. If a Quality Control Inspector is found to have any conflict of interest, FloridaCommerce may, at its own discretion, require the Subgrantee to hire a third party QCI to redo the inspection on a home or homes at the Subgrantee's cost.

QCI Completed Inspection Form

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Each Subgrantee weatherized dwelling will be inspected by a QCI. The QCI/DIR form will:

- a. Indicate the relationship of the QCI to the Subgrantee (Inspector/QCI or Independent Auditor/QCI);
- b. Document the inspection items and be signed and dated by the QCI;
- c. Be placed in the client file; and
- d. A copy must be included with the monthly Financial Activity (FA) when the dwelling is submitted to FloridaCommerce.

State Monitoring:

- a. Subgrantees implementing the I/QCI approach will require FloridaCommerce to perform a QCI on a minimum of five percent of the projected dwellings to be completed with DOE WAP funding.
- b. Subgrantees implementing the IA/QCI will require FloridaCommerce to perform a QCI on a minimum of 10 percent of the projected dwellings to be completed with DOE WAP funding.

Non-Compliance Situations:

During a state monitoring visit, if it is determined that the certified QCI individual demonstrated inadequate inspection practices, FloridaCommerce may implement the following steps:

- a. Bring the issue to the attention of the Subgrantee inspector and/or certified QCI individual during the visit;
- b. Discuss the issue to determine why the error occurred;
- c. Document the issue by photograph;
- d. Determine what corrective actions are required;
- e. Have the Subgrantee coordinate with the contractor/crew to perform the corrective actions required (if a workmanship issue) to achieve compliance and provide photo documentation of the corrected activity to FloridaCommerce within a prescribed time frame;
- f. Determine if additional training is required for the QCI individual (if only a minor or one-instance situation);
- g. Consider having another independent QCI individual perform a spot check of dwellings and files to be reported on the following months FA prior to that report being submitted;
- h. Request a copy of all documentation (Priority List Assessment and Testing (PLAT), audit, priority list, etc.) for a dwelling to be reported in the following month along with photos of all measures installed; and
- a. Coordinate a follow-up spot check Quality Assurance (QA) visit focusing on the past issue, the QCI documentation, and conduct a dwelling inspection.

Repeat Non-Compliance Situation

Each QCI non-compliance situation will be handled on a case-by-case basis. If the Certified QCI individual is found to be in non-compliance (repeat infractions) in performing the QCI, a written notification from FloridaCommerce will be provided to the Subgrantee directing it to seek alternate means for having the QCI performed on future dwellings. The QCI individual will also be notified in writing of their suspension from performing future QCIs for Florida Subgrantees. If that individual participates in refresher QCI training, they may be given an opportunity to demonstrate competency during a supervised, probationary period. Each suspension situation will be handled on a case-by-case basis.

V.6 Weatherization Analysis of Effectiveness

Subgrantee effectiveness is assessed through multiple measures. On-site monitoring requirements described in V.8.3 Monitoring Activities provide ideal conditions during which Subgrantees may be evaluated and areas in need of improvement can be identified.

In addition to the formal monitoring reporting that tracks deficiencies and findings and outlines how to make improvements, monitoring visits allow for a comprehensive review of the agency. Such reviews may include technical and financial systems and procedures, follow up on previous training outcomes, and identification of future training needs and the sharing of "best practices" at all levels of operation.

Additionally, the following approaches are used to determine the Subgrantee implementation level and competency in meeting the goals of WAP:

- Reviewing monthly reports submitted by Subgrantees, reviewing the pre-and- post weatherization utility bills of households served, and performing monitoring visits and dwelling inspections that either supports Subgrantee effectiveness or brings up ineffective areas that need to be addressed.
- Comparing productivity or energy savings of all Subgrantees can indicate if additional training is required and supports initiating peer to peer

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or state coordinated training and technical assistance (T&TA) activities.

- Measuring the financial burn rates of each Subrecipients over the program year.
- Analysis of Subgrantee monitoring report responses can also indicate if additional assistance or training is needed.
- Following up with Subgrantees' corrective actions to ensure improvement on issues discovered during monitoring visits.
- Reviewing training credentials or attendance records to ensure that the Subgrantee is meeting the DOE required Quality Work Plan to implement the QCI and the Job Task Analysis (JTA) training/certification requirements.
- Comparing the annual risk analysis assessment of each Subgrantee's past performance to summarize the financial reviews, monitoring report (s), and any outstanding issues. From this assessment, each Subgrantee's needs, strengths, and weaknesses may be determined, and plans made to follow-up on providing the necessary T&TA to ensure future compliance.
- Review the total number of trainings scheduled and completed for the program year.
- Subgrantees determined to be at risk may be placed on probationary status for a period. Failure to achieve compliance during that time may result in termination of their agreement.

Plans of Action include training efforts with contractors and assessors, job site monitoring of contractors during blower door directed air sealing efforts, and field workshops sponsored or conducted by FloridaCommerce.

FloridaCommerce will strengthen the monitoring process by requiring a Subgrantee response to monitoring reports with findings, or numerous or repetitive observations, that requires not only documentation of correction of work deficiencies, but also the actions taken or planned that will ensure that similar deficiencies will not be repeated in future weatherization work.

V.7 Health and Safety

In accordance with the Final Rule and Weatherization Program Notice (WPN) 22-, FloridaCommerce will adopt the following approach to implementing health and safety measures:

Subgrantees shall comply with all applicable federal, state, and local building codes and regulations.

FloridaCommerce provides Subgrantees with an allocation of funds identified as a budget line item to be used for required health and safety measures. Specific health and safety related measures are reported in the designated electronic data reporting system. The purchase and maintenance of personal protective equipment and other safety equipment is allowed. Each Subgrantee has a Training and Technical Assistance (T&TA) budget, and those funds may be used to provide training and certification to address health and safety issues.

FloridaCommerce will budget health and safety funds at 7.8 percent of the Program Operations funds budgeted. Florida tracks health and safety labor and materials costs on its work order. Reporting data that populates the statewide database makes it possible to track and manage all health and safety costs.

FloridaCommerce encourages Subgrantees to maintain coverage for Pollution Occurrence Insurance (POI), but no longer makes it mandatory.

Subgrantees must comply with Occupational Safety and Health Administration (OSHA) and Safety Data Sheets (SDS) requirements in all weatherization activities under the revised Hazard Communication Standard (HCS) 29 CFR 1910, 1200, and take precautions to ensure the health and safety of themselves and others. Wherever workers or residents may be exposed to hazardous materials Subgrantees, contractors, and subcontractors will develop and maintain a written hazard communication program conforming to the HCS 29 CFR 1910, 1200. The Subgrantee shall ensure that:

- All hazardous chemicals in the workplace are listed;
- All containers of hazardous chemicals are labeled;
- SDS are maintained for all hazardous chemicals;
- Workers are informed and trained in program elements, hazards, and protective measures; and
- SDS must be posted wherever workers may be exposed to hazardous materials.

Subgrantees will be assessed and monitored to determine whether workers are utilizing safe work practices and following all OSHA standards.

Any deficiencies found shall be documented, and appropriate action will be taken to address the issue including additional training, notification of "at-risk" status, or issuance of "stop work" order, until such time as it is determined that Subgrantee understands all OSHA requirements and will adhere to them. FloridaCommerce will submit a Health and Safety Plan as part of the BIL application.

Required Client Health & Safety information can be found in the Weatherization Policy & Procedures Manual, page 125, Client Health and Safety Forms:

- a) Occupant Pre-existing or Potential Health Condition Screening

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- b) Hazard Identification Notification
- c) Radon Informed Consent Form

The process to verify EPA's Renovation, Repair and Painting (RRP) compliance can be found in the Weatherization Policy & Procedures Manual, page 136, Lead Paint.

V.8 Program Management

V.8.1 Overview and Organization

The Florida WAP is administered by FloridaCommerce. The WAP is located in the Division of Community Development, Bureau of Economic Self-Sufficiency (BESS). The WAP direct personnel roster consists of a Bureau Chief, Program Manager, six Government Operations Consultants II (monitors) and two Government Operations Consultants III. In addition to WAP, the Community Services Block Grant (CSBG) and the Low-Income Home Energy Assistance Program (LIHEAP) are also located in BESS. A complete FloridaCommerce organizational chart is included in the application.

Overall, there are 40 FloridaCommerce funded Subgrantees statewide providing WAP, CSBG and/or LIHEAP. There are 16 Subgrantees providing WAP services statewide (all 67 counties are served). In the event a Subrecipient cannot fulfill the terms of its contract, the State will use a temporary alternate Subrecipient to provide weatherization services for the area until a new Subrecipient for that area can be selected through the Request for Proposal process. This will help minimize the disruption for the service area until a new Subrecipient is in place.

Premised on the aforementioned, as FloridaCommerce continues to locate permanent provider(s) for the territories that Suwannee River Economic Council and Tampa-Hillsborough Action Plan previously serviced, Mid Florida Community Services will serve the Polk and Hillsborough Counties and Capital Area Community Action Agency will serve the Suwannee Territories^[1].

Financial assistance provided will be used to supplement and not supplant state or local funds.

Florida's use of WAP funding from DOE described in this plan conforms to the rules and regulations issued by DOE for expenditure of WAP funding.

^[1] Bradford, Columbia, Dixie, Gilchrist, Hamilton, Lafayette, Madison, Suwannee, Taylor, and Union County.

V.8.2 Administrative Expenditure Limits

The Florida WAP will follow the administrative expenditure limits outlined in Section 1011(g) of the Energy Act of 2020 and 42 U.S Code § 6865(a)(1), as amended, which states that "not more than an amount equal to 15 percent of any grant made by the Secretary under this part may be used for administrative purposes in carrying out duties under this part, except that not more than one-half of such amount may be used by any State for such purposes."

There will be a direct split of 7.5 percent between FloridaCommerce and its Subgrantees.

An exception to exceed the 15 percent administrative requirement shall apply to Subgrantees funded at less than \$350,000 of DOE funds. Subgrantee agencies are required to submit justification for administrative funds in excess of five percent of the total grant, with state approval based on the individual Subgrantee needs. However, FloridaCommerce's budget does not include additional Subgrantee Administration funds beyond the minimum requirement.

V.8.3 Monitoring Activities

In accordance with 10 CFR 440, as the Grantee of the Weatherization Assistance Program, FloridaCommerce has an established monitoring system for evaluating Subgrantees' performance regardless of funding source. FloridaCommerce adheres to WPN 20-4 and ensures that monitoring functions will be the state's principal method for determining Subgrantee compliance with the regulations contained in 10 CFR 440, applicable 2 CFR Part 200 – Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards, Weatherization Program Notices, and any other procedures that DOE may issue.

Monitoring activities will ensure the evaluation of actual accomplishments against planned activities and determining the effectiveness of the WAP policy. Monitoring also provides objective reporting to and from Subgrantees and makes recommendations to address program and administrative deficiencies and needs.

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Compliance Subgrantee Monitoring is staffed with ten monitors not dedicated to weatherization. A portion of staff salaries are paid for out of WAP Grantee administrative funding and WAP Grantee T&TA funding.

Supplemental funding received from LIHEAP covers the remaining cost for salaries, monitoring and a portion of the outsourcing of additional QCI performed during monitoring visits. A breakout of projected monitoring expenditures to be charged to WAP is provided in the budget detail (PF-20A) of this application.

FloridaCommerce will monitor each Subgrantee once per year during the funding cycle. Many of the WAP Subgrantees also receive funds through Department of Health and Human Services Community Services Block Grant, and Low-Income Home Energy Assistance Program. Whenever possible, all three programs will be monitored during one visit to the Subgrantee.

The state level QCI function will be outsourced utilizing certified QCI independent contractors. This added skillset incorporated at the state level will enhance the technical competency of the monitors as well as the Subgrantee network of technical staff.

Each Subgrantee will be monitored on site by state WAP designated representative. The visit will consist of an administrative, fiscal, and programmatic review in addition to completing state level required QCI on:

- a. At least five percent of the completed dwellings inspected for Subgrantees utilizing the Independent QCI option; and
- b. At least 10 percent of the completed dwellings inspected for Subgrantees utilizing the Independent Auditor/QCI option

A description of the relationship between the certified individual(s) performing the final inspection and the installed work can be found in the Weatherization Policy & Procedures Manual, page 2, Independent Auditor/Quality Control Inspector (IAA/QCI) and Independent/Quality Control Inspector (I/QCI). FloridaCommerce is onboarding a vendor to conduct the QCI monitoring inspections.

The Focus of the Administrative Review:

1. Review of procurement procedures to comply with 2 CFR 200.
2. The cost or purchase and delivery of weatherization materials (10 CFR 440.18). Funds may only be expended on weatherization materials in Appendix A of 10 CFR 440 or as approved by DOE.
3. Labor costs in accordance with 10 CFR 440.19.
4. Purchase or annual lease of tools, equipment and/or vehicles, except that any purchase of vehicles must be referred to DOE for prior approval in every instance (10 CFR 440.18(d)(6)).
5. The costs of incidental repairs to make the installation of weatherization materials effective
(10 CFR 440.18(d)(9)).
6. The costs of liability insurance for weatherization projects for personal injury and property damage
(10 CFR 440.18(d)(10)).
7. The cost of carrying out low cost/no cost weatherization assistance (10 CFR 440.20).
8. The cost of WAP financial audits in accordance with 10 CFR 440.23.
9. Administrative costs (10 CFR 440.18(d)(13)).
10. The costs of eliminating health hazards necessary to ensure the safe installation of weatherization materials (10 CFR 440.18(d)(15)).

Quality Assurance Activities:

Based upon review of the monthly program, fiscal, and Quality Control Inspection (QCI) Reports and the results of any modified or regular monitoring visits, the monitor may determine that additional on-site Quality Assurance (QA) visits may be warranted.

In the interim, the monitor will perform a desk monitoring of monthly reports and supporting documentation submitted to confirm Subgrantee performance regarding meeting agreement deliverables, reporting deadlines, material and labor costs and budget/expenditures. Monitoring schedules may also be changed based on the results of the review of the following items:

- The FloridaCommerce Office of Inspector General audit;
- The last monitoring report;
- Most recent independent audit;
- Monthly fiscal reports;
- Up-to-date production records;

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- A review of applicable board minutes;
- Interactions/communications with the Subgrantees' coordinator and fiscal staff;
- T&TA Form/Report;
- Needs or requests submitted by the Subgrantee; and
- Deferral units reported to the state office since the last monitoring visit.

**Note: As referenced in Section V.1.2 Approach to Determining Building Eligibility, subsection "Describe the Deferral Process," a dwelling unit may be deferred services for a number of reasons. During the monitoring visit, the client files on any deferred clients will be reviewed for compliance to following guidelines and if applicable, consider visiting the deferred dwelling unit to confirm the conditions of situations that resulted in the deferral action being implemented.*

State Level QCI Monitoring:

FloridaCommerce will utilize funding to contract QCIs to prepare QCI Reports during the grant cycle. FloridaCommerce will grant contractors the flexibility to hire subcontractors with the funds to conduct QCI Reports, if necessary.

Prior to conducting a monitoring visit, the Contract Manager will review the QCI Reports that have already been submitted by the Subgrantee for completed dwellings. Any QCI Reports that are questionable or have conflicting information will be earmarked for inspecting during the visit. Also, during the visit, the credentials of the individual performing the Quality Control Inspector (QCI) will be reviewed.

During the visit, if it is determined that there is a diagnostic testing result or workmanship issue that was not reported in the QCI Reports, the infraction will be brought to the attention of the individual who conducted the QCI and the Subgrantee to discuss how it was missed and what corrective actions are to be taken.

The Subgrantee will coordinate the required corrective action to be taken and have thorough photo documentation of the resolved issue. The QCI will be re-conducted and a new QCI Reports will be submitted to the state office along with all supporting photo documentation. The QCI individual will be put on notice and supporting documentation photos and test readings) may be required to be submitted along with the QCI by the Subgrantee for dwellings that had the QCI conducted by the same individual.

If applicable, the Subgrantee will be required to provide the state WAP office with the necessary changes that have been implemented and oversight activities that will ensure the issue is not repeated on future dwellings. The Subgrantee may also be required to submit QCI supporting photo documentation of dwellings completed for review and approval when they are submitted to the state WAP office with a monthly Financial Activity (FA).

If there is a second repeat occurrence of a failed QCI inspection, the issue will be discussed with all parties (Subgrantee management, QCI individual, and state WAP staff) to determine the best course of action. If it is determined that a QCI individual is not performing the task as required, that QCI individual may not be allowed to perform the QCI activity for Florida WAP Subgrantees or the state WAP office.

If significant deficiencies are discovered, such as health and safety violations, poor quality installation of materials, or major measures missed, then the Grantee must require the Subgrantee to take appropriate corrective action to resolve the outstanding issues in a timely manner. The Grantee must also increase both the frequency and percentage of units monitored (per WPN 22-4) of the Subgrantee until it can be verified that all deficiencies are resolved. Once deficiencies are corrected and procedures are established to prevent reoccurrence, the Grantee may resume its required sampling percentage of the Subgrantee's work in subsequent monitoring visits. The monitor will work with the Subgrantee to find another certified QCI individual to avoid any delay in meeting production goals.

State Level Monitoring Instrument:

- Financial/Administration
- Vehicles and equipment inventory
- Audits
- Financial management/accounting systems
- Payroll/Personnel
- Records retention
- Invoicing
- Contractor procurement process
- Client eligibility (Client file review)
- Contractor qualifications and licensing
- Pre and post inspections results
- Percentage of change-orders
- Energy audits
- Preparation of work orders
- Health and safety compliance
- Weatherization measures installation
- Quality Control Inspection report
- Qualifications and training assessment, and

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- Needed training and technical assistance

The applicable percentage of each Subgrantee's completed weatherized dwellings reported since the last monitoring visit will have a QCI performed and at least one dwelling "in progress" will be visited to assess:

- Quality and compliance,
- Appropriate and allowable materials,
- Appropriateness and accuracy of energy audits,
- Comprehensive final inspections,
- Safe work practices, and
- Lead safe weatherization protocols.

In addition, one dwelling ready for bid (diagnostic tests completed and bid prepared) will be visited to ensure the accuracy of applicable testing that had been performed. During the visit, a Subgrantee may be required to conduct diagnostic testing procedures if it appears that the interpretation of the results is questionable and if additional training is needed.

The monitoring process consists of the following activities:

The visit:

- A formal notification of upcoming visit correspondence is sent to the Subgrantee to schedule the time frame of the visit. The correspondence will include a list of documents to be made available for review and other specific programmatic activities relating to weatherized dwellings.
- An entrance interview will be held with Subgrantee management and weatherization staff to discuss any previous non-compliance issues along with the agenda for the visit.
- During the dwelling inspection process, if any health and safety issues are found that present imminent danger to the household, the Subgrantee will be directed to immediately resolve the issues.
- The applicable QCI dwelling and files inspection will be performed.
- An exit interview is held and issues that will be addressed in the follow-up report are covered.

The report:

- A written report that describes the monitoring assessment is issued to the Subgrantee within 30 days of the visit.
- The report will identify any existing or potential non-compliance issues found during the visit.
- For non-compliance or workmanship issues found during the dwelling inspection, photo documentation is included.
- Corrective actions are recommended, and the appropriate guidance document is referenced. Samples of best practices and what training is available may be provided if applicable.
- For issues regarding workmanship or measures installed on a dwelling that has already been reported as a completed unit, the Subgrantee is responsible for addressing the issue with the subcontractor and corrective actions should be the responsibility of the subcontractor.
- Disallowed costs will be reimbursed to the state.

Subgrantee response:

- Subgrantees will have 30 days after receipt of the monitoring report to respond.
- If the Subgrantee response and/or corrective action to be implemented are not sufficient to assure future compliance, additional clarification may be requested and the Subgrantee will have an additional 30-day time frame to achieve compliance.
- Failure by a Subgrantee to implement acceptable corrective actions or rectify a non-compliance issue at the end of the second response period may result in FloridaCommerce withholding of program reimbursements until
- compliance is met.
- Follow-up visits may be scheduled as determined by state staff or requested by Subgrantee staff to focus on a specific area of concern or to provide specific oversight or training.

Risk Assessment:

10 CFR 200.331 requirements for pass-through entities, necessitates FloridaCommerce, as pass-through entity, to assess the risk of Subgrantees and monitor their activities necessary to ensure that the subaward is used for authorized purposes, in compliance with Federal statutes, regulations, and the terms and conditions of the subaward.

In alignment with the regulation, FloridaCommerce's risk assessment and monitoring will address both financial, programmatic, and technical considerations of the Weatherization Assistance Program. Annually, a risk analysis assessment of each Subgrantee's past performance will be conducted after the program year to summarize the financial reviews, monitoring report(s) and any outstanding issues. From this assessment, each Subgrantee's needs, strengths and weaknesses may be determined, and plans made to follow-up on providing the necessary T&TA to ensure future compliance. Subgrantees determined to be 'High Risk' could be

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placed in a probationary status for a period.

The Florida Risk Assessment Tool will be used to assess key performance indices, measuring and prioritizing risks within the constraints of the defined risk levels and tolerance thresholds or acceptable risks. The risk factors considered will be determined based on prior experience, audit results, changes in systems, and the results obtained from monitoring. The scoring mechanism will be defined in terms of impact and the criteria defined as 'No Risk', 'Low Risk', 'Moderate Risk', and 'High Risk'.

Upon being classified as a "Moderate – High risk" Subgrantee and being placed on probationary status, the Subgrantee will be required to submit a detailed Corrective Action Plan (CAP) that will outline the processes to be implemented to address the issue(s) along with a timeline to achieve resolution. The monitor will assess the progress of the Subgrantee to determine the status of the resolution and that the submitted CAP is being implemented. If a site visit to the Subgrantee is warranted, it will be prioritized to be performed.

Failure by a Subgrantee to rectify the situation within the prescribed probationary time frame may result in the termination of the Subgrantee agreement and FloridaCommerce seeking another provider of weatherization services for that area. For any Subgrantee that is considered "at risk," QA visits will become part of the state oversight activity to ensure the CAP is being implemented.

Subgrantee Single Audit Reviews:

All Subgrantees are required to submit a copy of their annual single audit to FloridaCommerce's Office of Inspector General (OIG) for review. The OIG performs a preliminary review of the audit and then provides the audit and a technical review questionnaire to the Florida WAP office. WAP staff and management review the audit and discuss.

If there are findings regarding the Subgrantee's direct administration of WAP or indicate an organizational activity considered to be a material weakness or deficiency finding WAP management provides comments and drafts a management decision letter for review. Then, upon consultation with OIG staff, the final management decision letter is provided to the Subgrantee.

Florida WAP staff will follow up with the Subgrantee to address any questions or provide additional clarification regarding corrective actions required to resolve the issue. As indicated in the QA section, additional onsite visits as applicable may be coordinated to ensure applicable corrective actions are being implemented to ensure resolution in a timely manner.

Others action to be taken once the Risk Assessment is complete are:

- Training and technical assistance.
- Review of State policies and procedures.
 - Developing policies and procedures to guide the areas identified.
- A deeper focus on monitoring.

Subgrantees who expend less than \$750k in federal funds from all sources are not required to complete a single audit.

Subgrantee Termination:

If it is determined that a Subgrantee does not have the capacity to implement WAP to ensure compliance with all procedures, guidelines, etc. even after substantial T&TA is provided by the state WAP office, that Subgrantee's agreement may be terminated.

V.8.4 Training and Technical Assistance Approach and Activities

The training and technical assistance (T&TA) aims to provide the State, Subgrantees, and its contractors with the information and training required to administer and operate in compliance with DOE/State regulations. Further, T&TA aims to maximize energy savings, improve program and operation efficiencies, improve crew/contractor work quality, reduce the potential of waste, fraud, abuse, and mismanagement, and increase client satisfaction. To adhere to Federal and State regulations and stay in alignment with DOE's WPN 22-4 Quality Work Plan, Section 3: Workforce Training and 10 CFR 440.12(b)(7), FloridaCommerce will engage in comprehensive and specific training such as: Retrofit Installer, Crew Leaders, Energy Auditor, and QCI Inspector trainings, and explore the possibility of a Weatherization Installer Badges Toolkit system in the T&TA approach and activities.

To support this goal, FloridaCommerce aims to work in tandem with the Florida Association of Community Action (FACA), Inc., to establish and execute a training plan that will comply with DOE's WPN 22-4. The training plan will be provided by the Interstate Renewable Energy Council (IREC) entities and will address elements for training as specified above. FACA will assist in developing methods of data collection to identify and assess the subgrantees' training needs, and designing a comprehensive and specific curriculum to ensure that the trainings are customized to meet the needs of the weatherization workforce and unique energy efficiency programs. Further, FloridaCommerce will be collaborating with FACA to procure and secure an IREC accredited Training Provider for comprehensive trainings, which will meet the requirements of the Quality Work Plan. These trainings will be mandatory for the entire Florida WAP network and necessary for the workforce ramp-up.

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Quality Control reviews will be conducted by a certified quality control inspector and based on the findings, a Subgrantee may receive onsite technical assistance aimed at improving individual Subgrantee staff skills in assuring work quality. Technical assistance will also be provided by the FloridaCommerce reviewer or monitoring staff to assess training needs.

Comprehensive Training

FloridaCommerce will contract with the Florida Association of Community Action (FACA) to develop and implement a Florida WAP training plan for PY 2024-2025. The primary goal of the plan is to provide continuing education and certification opportunities for practitioners of the Florida WAP.

Comprehensive training will be provided by accredited IREC training providers and, in compliance with Section 3 of WPN 22-4, FloridaCommerce will track that comprehensive training for each job category is obtained within one year of being hired and that re-training occurs thereafter every three years.

Whereas it is the responsibility of FloridaCommerce to provide funds for training through IREC training providers, it is the responsibility of the Subgrantee to ensure training is completed by staff and/or subcontractors. FloridaCommerce will work to develop a plan to ensure Subgrantees guarantee their contractors obtain and maintain the required Tier 1 training certifications. FloridaCommerce will monitor Subgrantee progress and track credentials.

Weatherization staff may not function unsupervised until training and certification requirements are met.

Comprehensive training offerings will include but are not limited to:

- NEAT/MHEA training
 - NEAT/MHEA training and testing
 - NEAT/MHEA electronic audit reviews
- BPI Energy Auditor training
- Retrofit Installer training
- Health and Safety – according to OSHA Standards
- QCI/HEP Energy Auditor training and testing
- Contractor training

Specific Training

On-site visits provide firsthand, observable evidence for T&TA. Therefore, through monitoring, FloridaCommerce staff will analyze data on a variety of financial, production and weatherization retrofit information. Trends indicating extreme high/lows in production and completed weatherization measures will be noted and tracked for appropriate follow up. Technical weatherization skills will be closely monitored, and any deficiencies will be shared with Subgrantees, and specific training requirements will be mandated.

Additionally, FloridaCommerce staff or contractor(s) will provide on-site, or off-site T&TA as needed. Needs may be identified by the Subgrantee staff, DOE project officer monitoring visits, internal state audits, OIG reports; or by FloridaCommerce staff as a result of observation for resolution of problems or to meet updates required by DOE.

Subgrantees will have the opportunity to identify and address their own T&TA needs through local initiatives. Subgrantee-specific needs may include such items as basic energy conservation concepts, program requirements, and work techniques.

Based on the specific needs identified, specialized training that will be provided includes, but are not limited to:

- Technical Training – ASHRAE 62.6 2016 – residential ventilation. At this time, FloridaCommerce has not approved any ASHRAE variance requests.
- Annual Weatherization Conference Sessions
 - FACA Annual Network training
 - NASCSP Annual Winter WAP Conference
- Combustion Appliance Zone
- Blower door & duct testing
- Lead Safe weatherization
- Health and Safety – according to OSHA standards
- Multifamily training
- Historic Preservation training
- Procurement training
- Financial Activity training will be provided by FloridaCommerce, Bureau of Financial Management or Coastal Cloud at the request of the subrecipient.

FloridaCommerce staff will also attend DOE mandated activities/events, National Association for State Community Services Programs (NASCSP) events, state weatherization managers' meetings, national DOE conferences, and other staff development trainings as needed or required.

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Installer Badges Toolkit

FloridaCommerce will explore the possibilities of utilizing the Installer Badge Toolkit as it provides a flexible, customizable, and voluntary approach to training and skills recognition for WAP Retrofit Installer Technicians (RIT), Crew Leaders, and other contractors. The Installer Badges concept will allow Florida's WAP crew members to learn the basics of a specific task to allow for in-field experience and skill recognition. It further provides a consistent approach to training and ensuring that installers across the state are synchronized in their WAP skillset.

Provision of Training and Technical Assistance:

1. On-site technical assistance visits will be conducted by FloridaCommerce monitoring staff, as requested, or required. Any Subgrantee experiencing management, production, operational, or compliance problems will be provided technical assistance and a plan of recommended corrective action. Verbal recommendations will be given to the Executive Director, Weatherization Director, or Weatherization Coordinator prior to the end the visit. A letter or a monitoring report reiterating those recommendations will be sent within 30 days of the visit and a follow-up visit will be made to evaluate progress.
2. FloridaCommerce will procure a training provider in collaboration with FACA based on the training needs and other factors for the WAP Network.
3. FloridaCommerce will continue to utilize the FACA contract to conduct BPI EA, QCI, and building science trainings throughout the year and procure a trainer directly to the state that is IREC accredited in all required areas.
4. Subgrantees will have the opportunity to select a training provider for meeting the training needs recommended and mandated by the Florida WAP office. Subgrantees must have FloridaCommerce approval for all out-of-state training and travel costs. It is strongly recommended that Subgrantees utilize local/in-state training resources to maximize their T&TA funds.
5. Should a Subgrantee hire a new Weatherization Director/Coordinator, the Subgrantee is required to notify FloridaCommerce in writing within 30 days of the date of hire and request training. FloridaCommerce will contact the Subgrantee within 30 days of receipt of notification to arrange for training. FloridaCommerce will use in-house staff and/or other weatherization professionals to provide training.
6. Subgrantees may use available T&TA funds to support locally initiated training and to make effective use of available state training venues. To ensure coordination of training activities, all Subgrantee T&TA funds shall be itemized and budgeted into the following categories:
 - a. Costs for travel and per diem for attendance at all FloridaCommerce hosted T&TA workshops, seminars, meetings, or classes.
 - b. Supplemental training not offered by FloridaCommerce for Subgrantee staff training must relate directly to the attendee's WAP job duties.
 - c. Purchase of training materials, including training and testing costs, necessary to meet OSHA safety standards.
 - d. Percentage of salary for a staff person responsible for ensuring that training, safety requirements, and needs are met and to oversee in-house weatherization training.
7. To ensure coordination of training activities, all Grantee T&TA funds shall be itemized and budgeted into the following categories:
 - a. Purchase of training materials, including training and testing costs, necessary to meet OSHA safety standards.
 - b. Travel for Florida WAP staff to attend conferences, meetings, trainings, and seminars.
 - c. Other T&TA initiatives in conjunction with local T&TA programs.
8. As needed, Subgrantees may receive targeted training for single-issue, short-term training pertaining to identified field deficiencies and/or enhancement of existing knowledge, skills, and abilities.
9. FloridaCommerce shall continue to ensure an effective exchange of program information via:
 - a. Active involvement with the WAP Policy Advisory Committee (PAC).
 - b. Promotion of statewide meeting initiated by the Florida Weatherization Network (FWN) Council and representatives of the PAC at which management, technical, and general informational topics will be discussed according to current need.
 - c. Scheduling statewide weatherization meetings to develop new training approaches and refine the existing courses to best meet the needs of the Subgrantee.
 - d. Updates to program management guidance, including operations memos, information updates and revisions in the Policy and Procedures Manual, when necessary.
 - e. Encouragement of information exchange and skills transfer among Subgrantees on an informal basis.

Assessment of State T&TA Activities

The effectiveness of T&TA activities will be evaluated through the following:

- o The use of Florida's WAP T&TA Planning and Reporting Form,
- o Local training activities and local T&TA expenditure reports,
- o Quarterly review of the Florida WAP training tracking database to measure and track training efficiency,
- o Onsite monitoring and observations and reporting of improvement in work standards,
- o Review of local T&TA curriculum and activities,
- o Formal evaluation forms completed by participants to statewide training workshops, and
- o Surveys to Subgrantees and contractors.

The WAP Production Snapshot will be updated to ensure that records of staff and their associated training certifications are up-to-date and to assess future

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needs within the program. A Subgrantee Enterprise Resource Application (SERA) integrated credentialing solution will be released to replace the monthly Production Snapshots.

Client education has been provided over the years by different methods in each area of the state, ranging from detailed discussions with clients during pre-and post-inspections to access to program-related publications. FloridaCommerce will continue to require WAP Subgrantees provide client education to each WAP client. Subgrantees will be required to provide (at minimum) educational materials in verbal and written format.

The Florida WAP will assess fuel savings effectiveness using data provided by the Subgrantees on pre-and post-weatherization energy usage derived from client-submitted energy bills. This analysis provides FloridaCommerce with information from a sampling of weatherized units, allowing staff to identify significantly high and significantly low performers. FloridaCommerce will analyze the data for T&TA purposes allowing them to compare effectiveness within a Subgrantee’s area and between Subgrantees. The need for additional T&TA will be identified by FloridaCommerce and the Subgrantee.

Workforce Credentials:

Florida law requires general contractors to meet specific requirements to register as a certified general contractor. These requirements are outlined on The Florida Department of Business and Professional Regulation’s (DBPR) website^[1], as follows:

1. Pass State certification examination.
2. Fill out initial licensure application form with DBPR.
3. Applicants are required to have four years of experience or a combination of college and experience.
4. Applicants will need to provide proof of financial stability and responsibility by submitting credit reports for themselves and the business entities (if applicable).
5. An applicant must have a background check as part of the licensing process.
6. Applicants are required to attest that they have obtained public liability and property damage insurance in the amounts determined by Board rule. Applicants are also required to obtain workers compensation insurance or obtain an exemption from workers compensation insurance within 30 days of issuance of their license.
7. Pay the required fee as provided in the application.
8. Must be at least 18 years of age.

Subgrantees are responsible for regularly checking the Florida DBPR Licensee Search to ensure that their contractors’ and subcontractors’ licenses are up to date. Additionally, FloridaCommerce staff utilize a monitoring instrument that addresses contractor qualification and licensing during annual monitoring visits.

With the assistance of FACA, FloridaCommerce recently completed a WAP Subgrantee Workforce Survey to determine the number of specialty licensed professionals, retrofit installers, crew leads, energy auditors, inspectors, managers, directors, and support staff within the WAP network, to ensure the network has sufficient staff to meet the DOE grant requirements. FloridaCommerce will continue to collaborate with FACA to develop a complete workforce credential plan to ensure that sufficient number and distribution of certified individuals available to meet and maintain weatherization requirements. T&TA and program outreach will be performed in areas of Florida which lack certified professionals. Florida has also budgeted for the procurement of a workforce development consultant to assist with ramp-up, workforce credential planning, and wage studies during the program year.

[1] https://www.myfloridalicense.com/CheckListDetail.asp?SID=&xactCode=1030&clientCode=0605&XACT_DEFN_ID=3077

Percent of overall trainings

Comprehensive Trainings:	50.0
Specific Trainings:	50.0

Breakdown of T&TA training budget

Percent of budget allocated to Auditor/QCI trainings:	40.0
Percent of budget allocated to Crew/Installer trainings:	40.0
Percent of budget allocated to Management/Financial trainings:	20.0

V.9 Energy Crisis and Disaster Plan

The purpose of FloridaCommerce’s disaster plan is to provide emergency services to low-income individuals and families affected by a disaster as determined by a Presidential or Gubernatorial order declaring a federal or state emergency.

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In the event of a disaster declaration, Florida will allow Subgrantees to assist eligible clients with weatherization funds. The allowable expenditures under the WAP are limited to include the following:

- The cost of incidental/additional repairs to an eligible dwelling unit, if such repairs are necessary to make the installation of weatherization materials effective, per 10 CFR 440.18(d) (9).
- The cost of eliminating health and safety hazards, which is necessary before the installation of weatherization materials per 10 CFR 440.18(d) (9) and 10 CFR 440.18(d) (15).
- To install or otherwise provide weatherization materials for a dwelling unit weatherized previously with grant funds if such dwelling unit has been damaged by fire, flood, or act of God and repair of damage weatherization materials is not paid for by insurance, per 10 CFR 440.18(f) (2) (ii).

As indicated, WAP grant funds have a very limited role in any disaster response. Funds are limited to eligible weatherization activities and the purchase and delivery of weatherization materials. As such, Subgrantees may prioritize service to buildings occupied by disaster victims. In some cases, Subgrantees covering adjacent areas will be allowed to perform work in disaster areas, with the consent of the Subgrantees that primarily serves that area. Work will be limited to allowable program measures. In cases where a previously assisted unit has been damaged by fire, flood, or other natural disaster, assistance can be provided with prior approval from FloridaCommerce.

Weatherization service requests received from households located in the disaster area may need to be reprioritized, as long as the households are eligible for WAP, meet the priorities described in 10 CFR 440.16(b), and are free and clear of any insurance claim, or other form of compensation, as a result of damage incurred by the disaster.

Other disaster related activities that may be considered may require prior approval from FloridaCommerce include:

1. Debris removal at a dwelling unit, to facilitate the weatherization of the unit;
2. Weatherization personnel can be paid to perform functions related to protecting DOE WAP investment, such as:
 - a. Securing weatherization material, tools, equipment, weatherization vehicles; or
 - b. Protection of local Subgrantee weatherization files, records, and the like during the initial phase of the disaster response.

Weatherization vehicles and/or equipment may be used to assist in disaster relief provided that WAP is reimbursed in accordance with 2 CFR Part 200. The cost to pay weatherization personnel to perform relief work outside the scope of weatherization due to a disaster is not allowable.

The total allowance for the installation of each weatherization measure is limited to the current maximum reimbursement per Subgrantee contract.