

APPLICATION FOR FEDERAL ASSISTANCE SF-424

Version 02

1. Type of Submission:

- Preapplication
- Application
- Changed/Corrected Application

2. Type of Application:

- New
- Continuation
- Revision

If Revision, select appropriate letter(s)

Other (specify)

Other (specify):

added carryover and made budget updates

3. Date Received

10/20/2023

4. Applicant Identifier:

5a. Federal Entity Identifier:

5b. Federal Award Identifier:

DE-EE0009899 (SF424 revision 1)

State Use Only:

6. Date Received by State:

10/20/2023

7. State Application Identifier:

8. APPLICANT INFORMATION:

a. Legal Name: Idaho Department of Health and Welfare

b. Employer/Taxpayer Identification Number (EIN/TIN):
826000995c. UEI:
WP92EVJB9HF9

d. Address:

Street 1: 450 West State St, 2nd Floor

Street 2:

City: Boise

County: ADA County

State: ID

Province:

Country: U.S.A.

Zip / Postal Code: 837020000

e. Organizational Unit:

Department Name:
Dept. of Health and WelfareDivision Name:
Division of Welfare

f. Name and contact information of person to be contacted on matters involving this application:

Prefix: Mrs First Name: Lisa

Middle Name:

Last Name: Johnson

Suffix:

Title: Program Manager

Organizational Affiliation: Idaho, Dept of Health and Welfare

Telephone Number: 2083327352

Fax Number:

Email: Lisa.Johnson@dhw.idaho.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.):

State of Idaho

15. Descriptive Title of Applicant's Project:

The Weatherization Assistance Program enables low-income families to permanently reduce their energy bills by making their homes more energy efficient. Funds are used to improve the energy performance of dwellings of needy families using the most advanced technologies and protocols available in the housing industry. Final allocations will include adjustments from the planning numbers reflected in WPN 24-2 and the draft state plan necessary to align with final DOE appropriations for WAP .

APPLICATION FOR FEDERAL ASSISTANCE SF-424

Version 02

16. Congressional District Of:

a. Applicant: Idaho Congressional District 01

b. Program/Project: ID-Statewide

Attach an additional list of Program/Project Congressional Districts if needed:

17. Proposed Project:

a. Start Date: 04/01/2024

b. End Date: 03/31/2025

18. Estimated Funding (\$):

a. Federal	0.00
b. Applicant	0.00
c. State	0.00
d. Local	0.00
e. Other	231,452.00
f. Program Income	0.00
g. TOTAL	231,452.00

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: Janet

Middle Name:

Last Name: Sacks

Suffix:

Title: Financial Executive Officer

Telephone Number: 2085594977

Fax Number: 2083345694

Email: Janet.Sacks@dhw.idaho.gov

Signature of Authorized Representative: Signed Electronically

Date Signed:

U.S. DEPARTMENT OF ENERGY



BUDGET JUSTIFICATION FOR FORMULA GRANTS

Applicant: Idaho Department of Health and Welfare
 Award number: EE0009899

Budget period: 04/01/2024 - 03/31/2025

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

Direct Personnel Compensation:

<u>Position</u>	<u>Salary/Rate</u>	<u>Time</u>	<u>Direct Pay</u>
Program Specialist	\$29.10	200.0000 hours	\$5,820.00
Program Manager	\$39.87	200.0000 hours	\$7,974.00
Program Specialist	\$26.70	1680.0000 hours	\$44,856.00
		Direct Pay Total	\$58,650.00

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.

IDHW currently does not have a Federal fringe rate agreement, either pending or in effect. IDHW uses the following formula to calculate fringe benefit rates:

- 6.20% FICA SSDI
- 1.45% FICA SSHI
- 0.00% Unemployment Insurance
- 0.72% Life Insurance
- 11.18% Retirement
- 0.00% Sick Leave
- 2.00% Human Resources
- 1.12% Workman’s Compensation
- 25.53% Health Insurance
- 48.20% Total Fringe Rate**

Fringe Benefits Calculations

<u>Position</u>	<u>Direct Pay</u>	<u>Rate</u>	<u>Benefits</u>
Program Specialist	\$5,820.00	48.2095 %	\$2,805.79
Program Manager	\$7,974.00	48.2070 %	\$3,844.03
Program Specialist	\$44,856.00	48.2013 %	\$21,621.18
		Fringe Benefits Total	\$28,271.00

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>
NASCSP Conference (Fall)	2	\$3,564.00	\$7,128.00
PY24 NASCAP Conference (Spring)	2	\$3,580.00	\$7,160.00
Fiscal/Admin Monitoring On-site visits	5	\$332.80	\$1,664.00
		Travel Total	\$15,952.00

- 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.

Travel cost estimates are based on actual costs for travel from prior program years.

Idaho has an established travel policy that outlines the allowable per diems and process that must be followed.

<https://idhw.sharepoint.com/sites/DMS-FIN-PolicyManual/SitePages/Policies/Travel%20Policy.aspx>

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.

<u>Equipment</u>	<u>Unit Cost</u>	<u>Number</u>	<u>Total Cost</u>	<u>Justification of Need</u>
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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.

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.

<u>General Category</u>	<u>Cost</u>	<u>Justification of Need</u>
Printing	\$1,500.00	Public hearing notices required under grant. Costs are based on prior season actual costs.
Materials and Supplies Total	\$1,500.00	

- 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.

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).

<u>Name of Proposed Sub</u>	<u>Total Cost</u>	<u>Basis of Cost*</u>
Subgrantees Listed in Annual File, Sect. IV.1.	\$2,902,656.00	Includes all funds allocated to Direct Service Provider Administration: \$336,706.53; Direct Service Provider T&TA: \$188,870.00; Program Operations: \$1,594,135.70 Health & Safety: \$206,518.00; Liability Insurance: \$45,000; Financial Audit: \$18,000; and Leveraging: \$6,000 Wx Readiness \$507,425.77.
Contracts and Subgrants Total	\$2,902,656.00	

*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.

<u>General Description</u>	<u>Cost</u>	<u>Justification of Need</u>
NASCSP Dues	\$3,000.00	Idaho is a member of NASCSP and benefits from the Training and Technical Assistance they provide through webinars, conferences and the NASCSP Portal.
Reserved T&TA	\$9,930.00	T&TA retained by Grantee for unplanned training needs identified during monitoring or requested by DSPs
Other Direct Costs Total	\$12,930.00	

- 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.

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.

Indirect charges are estimated (Attachment 7) to be \$9,089.00. Final indirect expenses will be allocated based on a federally approved cost allocation plan.

The IDHW Indirect Cost Agreement was approved by the Department of Health and Human Services on November 3, 2022. It went into effect on July 1, 2021. Please see the attached Cost Allocation Plan to view the approval letter from HHS.

- 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: Janet Sacks

Phone Number: 2083345778

Indirect costs calculations:

Indirect Cost Account	Direct Total	Indirect Rate	Total Indirect
PY 24 Indirect	\$2,788,507.00	0.3259 %	\$9,087.74
PY 24 Indirect Cost Rounding	\$1.26	100.0000 %	\$1.26
		Indirect Costs Total	\$9,089.00

BUDGET INFORMATION - Non-Construction Programs

1. Program/Project Identification No. EE0009899	2. Program/Project Title Weatherization Assistance Program
3. Name and Address Idaho Department of Health and Welfare 450 West State St, 2nd Floor Boise, ID 837020000	4. Program/Project Start Date 04/01/2024
	5. Completion Date 03/31/2025

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		\$ 2,797,596.00		\$ 2,797,596.00
2. Other			\$ 0.00		\$ 231,452.00	\$ 231,452.00
3.						
4.						
5. TOTAL		\$ 0.00	\$ 0.00	\$ 2,797,596.00	\$ 231,452.00	\$ 3,029,048.00

SECTION B - BUDGET CATEGORIES

6. Object Class Categories	Grant Program, Function or Activity				Total (5)
	(1) GRANTEE ADMINISTRATI ON	(2) SUBGRANTEE ADMINISTRATI ON	(3) GRANTEE T&TA	(4) SUBGRANTEE T&TA	
a. Personnel	\$ 58,650.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 58,650.00
b. Fringe Benefits	\$ 28,271.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 28,271.00
c. Travel	\$ 0.00	\$ 0.00	\$ 15,952.00	\$ 0.00	\$ 15,952.00
d. Equipment	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
e. Supplies	\$ 1,500.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 1,500.00
f. Contract	\$ 0.00	\$ 336,706.53	\$ 0.00	\$ 188,870.00	\$ 2,902,656.00
g. Construction	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
h. Other Direct Costs	\$ 0.00	\$ 0.00	\$ 12,930.00	\$ 0.00	\$ 12,930.00
i. Total Direct Charges	\$ 88,421.00	\$ 336,706.53	\$ 28,882.00	\$ 188,870.00	\$ 3,019,959.00
j. Indirect Costs	\$ 9,089.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 9,089.00
k. Totals	\$ 97,510.00	\$ 336,706.53	\$ 28,882.00	\$ 188,870.00	\$ 3,029,048.00
7. Program Income	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

BUDGET INFORMATION - Non-Construction Programs

1. Program/Project Identification No. EE0009899	2. Program/Project Title Weatherization Assistance Program
3. Name and Address Idaho Department of Health and Welfare 450 West State St, 2nd Floor Boise, ID 837020000	4. Program/Project Start Date 04/01/2024
	5. Completion Date 03/31/2025

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	\$ 0.00	\$ 2,797,596.00	\$ 231,452.00	\$ 3,029,048.00

SECTION B - BUDGET CATEGORIES					
6. Object Class Categories	Grant Program, Function or Activity				Total (5)
	(1) PROGRAM OPERATIONS	(2) HEALTH AND SAFETY	(3) LIABILITY INSURANCE	(4) LEVERAGING	
a. Personnel	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 58,650.00
b. Fringe Benefits	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 28,271.00
c. Travel	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 15,952.00
d. Equipment	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
e. Supplies	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 1,500.00
f. Contract	\$ 1,594,135.70	\$ 206,518.00	\$ 45,000.00	\$ 6,000.00	\$ 2,902,656.00
g. Construction	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
h. Other Direct Costs	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 12,930.00
i. Total Direct Charges	\$ 1,594,135.70	\$ 206,518.00	\$ 45,000.00	\$ 6,000.00	\$ 3,019,959.00
j. Indirect Costs	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 9,089.00
k. Totals	\$ 1,594,135.70	\$ 206,518.00	\$ 45,000.00	\$ 6,000.00	\$ 3,029,048.00
7. Program Income	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

BUDGET INFORMATION - Non-Construction Programs

1. Program/Project Identification No. EE0009899		2. Program/Project Title Weatherization Assistance Program	
3. Name and Address Idaho Department of Health and Welfare 450 West State St, 2nd Floor Boise, ID 837020000		4. Program/Project Start Date 04/01/2024	5. Completion Date 03/31/2025

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	\$ 0.00	\$ 2,797,596.00	\$ 231,452.00	\$ 3,029,048.00

SECTION B - BUDGET CATEGORIES

6. Object Class Categories	Grant Program, Function or Activity				Total (5)
	(1) FINANCIAL AUDITS	(2) Weatherization Readiness	(3)	(4)	
a. Personnel	\$ 0.00	\$ 0.00			\$ 58,650.00
b. Fringe Benefits	\$ 0.00	\$ 0.00			\$ 28,271.00
c. Travel	\$ 0.00	\$ 0.00			\$ 15,952.00
d. Equipment	\$ 0.00	\$ 0.00			\$ 0.00
e. Supplies	\$ 0.00	\$ 0.00			\$ 1,500.00
f. Contract	\$ 18,000.00	\$ 507,425.77			\$ 2,902,656.00
g. Construction	\$ 0.00	\$ 0.00			\$ 0.00
h. Other Direct Costs	\$ 0.00	\$ 0.00			\$ 12,930.00
i. Total Direct Charges	\$ 18,000.00	\$ 507,425.77			\$ 3,019,959.00
j. Indirect Costs	\$ 0.00	\$ 0.00			\$ 9,089.00
k. Totals	\$ 18,000.00	\$ 507,425.77			\$ 3,029,048.00
7. Program Income	\$ 0.00	\$ 0.00			\$ 0.00

U.S. Department of Energy
Weatherization Assistance Program (WAP)
BUDGET INFORMATION REMARKS
Grant Number: EE0009899, **State:** ID
Recipient: Idaho Department of Health and Welfare

Remarks

Warning Message Explanation - Our plan has a warning message displayed when verifying.

This is caused because the Annual File totals include the \$6,000 budgeted for leveraging. The WAP Budget Categories do not factor in leveraging. When the Annual File totals are compared to the WAP Budget Categories totals, the leveraging amount budgeted causes the two amounts to be off by \$6,000.00.

Time worked on Wx activities is billed to DOE funding.

The Subgrantee must comply with 2 CFR 200.500-521 (previously OMB A-133) if the Subgrantee expends greater than seven hundred fifty thousand dollars (\$750,000) annually in federal funds. Funds provided under this Subgrant may be used to pay for compliance with this Act in proportion to other funding sources available to the Subgrantee.

U.S. Department of Energy
WEATHERIZATION ASSISTANCE PROGRAM
SUBGRANTEE INFORMATION
State: ID Grant Number: EE0009899 Program Year: 2024

Name: **Community Action Partnership, Inc.** Contact: Mark Fleming, Housing Programs Director
UEI: S8WNMCEZ7C54
DUNS: 021818786
Address: 124 New 6th Street Phone: (208) 746-3351
Lewiston, ID 83501-0000 Fax: (208) 746-5456
Email: m.fleming@cap4action.org

Counties served: BOUNDARY County Tentative allocation: \$ 668,091.76 Congressional districts served: CD
IDAHO County Planned units: 41 ID-01
LATAH County
KOOTENAI County Type of organization: Non-profit organization
BONNER County
BENEWAH County
SHOSHONE County
LEWIS County
CLEARWATER County
NEZ PERCE County

Source of labor: Agency and Contractors

Name: **Eastern Idaho Community Action Partnership** Contact: Brad Simmons, Weatherization Director
UEI: CFCCQLMZZ2Y4
DUNS: 092026863
Address: P O Box 51098 Phone: (208) 522-5391
935 East Lincoln Road Fax: (208) 523-7878
Idaho Falls, ID 83401-0000 Email: bsimmons@eicap.org

Counties served: MADISON County Tentative allocation: \$ 380,125.08 Congressional districts served: CD
BUTTE County Planned units: 27 ID-02
CUSTER County Type of organization: Non-profit organization
FREMONT County
JEFFERSON County
TETON County
BONNEVILLE County
CLARK County
LEMHI County

Source of labor: Agency and Contractors

Name: **El-Ada Community Action Partnership** Contact: Kevin Viggers, Weatherization Director
UEI: LF1TCAJ9J6B5
DUNS: 098803364
Address: 701 East 44th, #1 Phone: (208) 377-0700
Boise, ID 83714-0000 Fax: (208) 377-0859
Email: kviggers@eladacap.org

U.S. Department of Energy
WEATHERIZATION ASSISTANCE PROGRAM
SUBGRANTEE INFORMATION
State: ID Grant Number: EE0009899 Program Year: 2024

Counties served:	ELMORE County OWYHEE County ADA County	Tentative allocation: \$ 566,104.61 Planned units: 41 Type of organization: Non-profit organization Source of labor: Agency and Contractors	Congressional districts served:	<u>CD</u> ID-02 ID-01
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Name: **Metro Community Services** Contact: Rito Reynoso, Weatherization Director
UEI: U8F6YGJS2388
DUNS: 099324907
Address: 4307 Skyway Street Phone: (208) 459-0065
Caldwell, ID 83605-0000 Fax: (208) 455-2342
Email: rito@metrocommunityservices.net

Counties served:	ADAMS County BOISE County VALLEY County CANYON County PAYETTE County WASHINGTON County GEM County	Tentative allocation: \$ 561,772.78 Planned units: 39 Type of organization: Non-profit organization Source of labor: Agency and Contractors	Congressional districts served:	<u>CD</u> ID-01
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Name: **South Central Community Action Partnership** Contact: Rod Burk, Weatherization Manager
UEI: TVEYWJUKMKR9
DUNS: 070023569
Address: P.O. Box 531 Phone: (208) 733-9354
Twin Falls, ID 83303-0531 Fax: (208) 733-9355
Email: rod@sccap-id.org

Counties served:	CAMAS County CASSIA County GOODING County LINCOLN County JEROME County TWIN FALLS County BLAINE County MINIDOKA County	Tentative allocation: \$ 389,592.22 Planned units: 23 Type of organization: Non-profit organization Source of labor: Agency and Contractors	Congressional districts served:	<u>CD</u> ID-02
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Name: **SouthEastern Idaho Community Action Agency** Contact: Rick Burgin, Weatherization Director
UEI: ET2BAK2AQMK4
DUNS: 073077356
Address: 1261 Wilson Avenue, Suite E Phone: (208) 232-1114
Pocatello, ID 83201-5787 Fax: (208) 237-3951
Email: rburgin@seicaa.org

U.S. Department of Energy
WEATHERIZATION ASSISTANCE PROGRAM
SUBGRANTEE INFORMATION
State: ID Grant Number: EE0009899 Program Year: 2024

Counties served:	POWER County CARIBOU County BANNOCK County FRANKLIN County BEAR LAKE County BINGHAM County ONEIDA County	Tentative allocation: \$ 336,969.55 Planned units: 19 Type of organization: Non-profit organization	Congressional districts served:	<u>CD</u> ID-02
		Source of labor: Agency and Contractors		

U.S. Department of Energy
Weatherization Assistance Program (WAP)
WEATHERIZATION ANNUAL FILE WORKSHEET
Grant Number: EE0009899, State: ID, Program Year: 2024
Recipient: Idaho Department of Health and Welfare

IV.1 Subgrantees

Subgrantee (City)	Planned Funds/Units
Community Action Partnership, Inc. (Lewiston)	\$668,091.76 41
Eastern Idaho Community Action Partnership (Idaho Falls)	\$380,125.08 27
El-Ada Community Action Partnership (Boise)	\$566,104.61 41
Metro Community Services (Caldwell)	\$561,772.78 39
South Central Community Action Partnership (Twin Falls)	\$389,592.22 23
SouthEastern Idaho Community Action Agency (Pocatello)	\$336,969.55 19
Total:	\$2,902,656.00 190

IV.2 WAP Production Schedule

Weatherization Plans		Units
Total Units (excluding reweatherized)		190
Reweatherized Units		0
Average Unit Costs, Units subject to DOE Project Rules		
VEHICLE & EQUIPMENT AVERAGE COST PER DWELLING UNIT (DOE RULES)		
A	Total Vehicles & Equipment (\$5,000 or more) Budget	\$0.00
B	Total Units Weatherized	190
C	Total Units Reweatherized	0
D	Total Dwelling Units to be Weatherized and Reweatherized (B + C)	190
E	Average Vehicles & Equipment Acquisition Cost per Unit (A divided by D)	\$0.00
AVERAGE COST PER DWELLING UNIT (DOE RULES)		
F	Total Funds for Program Operations	\$1,594,135.70
G	Total Dwelling Units to be Weatherized and Reweatherized (from line D)	190
H	Average Program Operations Costs per Unit (F divided by G)	\$8,390.19
I	Average Vehicles & Equipment Acquisition Cost per Unit (from line E)	\$0.00
J	Total Average Cost per Dwelling (H plus I)	\$8,390.19

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	190	29.3	5567
	Prior Year Estimate	179	29.3	5245
	Prior Year Actual	195	29.3	5714

Method used to calculate savings description:

U.S. Department of Energy
Weatherization Assistance Program (WAP)
WEATHERIZATION ANNUAL FILE WORKSHEET
Grant Number: EE0009899, State: ID, Program Year: 2024
Recipient: Idaho Department of Health and Welfare

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

190 units X 29.3 MBtu = 5,567 MBtus (Million British thermal units)

IV.4 DOE-Funded Leveraging Activities

Leveraged funds are essential to being able to fully weatherize homes and increase the number of homes weatherized throughout the state. These funds are used to offset the costs from DOE by braiding multiple funding sources in each home, which allows more homes to be weatherized.

Idaho expands weatherization services by receiving LIHEAP transfer funds and Utility funding from the following sources:

Idaho’s subgrantee network receives leveraged funding from some regulated utilities, some small non-regulated electric utility companies, and some local grants, to enhance the weatherization services we provide in each home. Leveraged funding from these sources is approximately \$2.7 million annually.

Idaho receives funding from Bonneville Power Association (BPA) that is allocated to five (5) of the six (6) subgrantees. These funds are used in conjunction with their existing DOE programs to weatherize and improve heating system efficiency in low-income housing.

Idaho also leverages LIHEAP funding with DOE funds. Idaho initially allocates the full fifteen percent (15%) allowed each program year. Idaho also requests additional funding to be allocated to weatherization through the LIHEAP Waiver process to increase the amount to twenty-five percent (25%).

Our subgrantee network utilizes the \$6,000.00 we allocate in Leveraging funds in the following ways:

- Work with utilities to outline weatherization services that are allowed to be completed using the leveraged funding.
- Partner with Northwest Energy Coalition (NWECC) to gain their assistance as advocates to expand low-income weatherization services for Avista, Rocky Mountain Power and Idaho Power.
- Time spent working to obtain landlord and owner investments for weatherization projects.

Leveraged funds can be used

- Pay for agency staff or hiring consultant staff to explore and develop partnerships with utility companies and other entities that will generate non-federal resources for Weatherization Application Instructions
- Provide oversight and administration of activities
- Hold meetings
- Facilitate matching funds
- Negotiate contracts, MOUs, etc.
- Develop program design
- Provide technical assistance

Idaho estimates being able to increase the number of homes weatherized by an additional two hundred (116) units during PY24 using leveraged funding.

IV.5 Policy Advisory Council Members

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

AARP	Type of organization: Non-profit (not a financial institution) Contact Name: Lupe Wissel Phone: 8662957284 Email: liwissel@aarp.org
Avista Utilities	Type of organization: Utility Contact Name: Renee Zimmerman Phone: 5094958273 Email: renee.zimmerman@avistacorp.com
Bonneville Power Administration	Type of organization: Utility Contact Name: John Williams Phone: 2088674978 Email: jjwilliams@bpa.gov

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Community Council of Idaho	Type of organization: Local agency Contact Name: Irma Morin Phone: 2089897917 Email: imorin@ccimail.org
Idaho Governor's Office of Energy and Mineral Resources	Type of organization: Unit of State Government Contact Name: Alexa Sakolsky-Basquill Phone: 2083321675 Email: Alexa.Sakolsky-basquill@oer.idaho.gov
Idaho Power	Type of organization: Utility Contact Name: Cheryl Paoli Phone: 2083882679 Email: cpaoli@idahopower.com
Idaho Public Utilities Commission	Type of organization: Unit of State Government Contact Name: Curtis Thaden Phone: 2083340322 Email: curtis.thaden@puc.idaho.gov
Intermountain Gas Company	Type of organization: Utility Contact Name: Kathy Wold Phone: 2083776179 Email: Kathy.wold@intgas.com
Living Independence Network Corporation	Type of organization: Non-profit (not a financial institution) Contact Name: Jeremy Maxand Phone: 2083363335 Email: Jmaxand@lincidaho.org
Rocky Mountain Power	Type of organization: Utility Contact Name: Charity Spires Phone: 5038137228 Email: charity.spires@pacificorp.com
South Central Community Action Partnership	Type of organization: Local agency Contact Name: Ken Robinette Phone: 2087339351 Email: ken@sccap-id.org
State Tribal Relations	Type of organization: Unit of State Government Contact Name: Lisa Jaramillo Phone: 2085133508 Email: Lisa.Jaramillo@dhw.idaho.gov

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

Date Held	Newspapers that publicized the hearings and the dates the notice ran
12/21/2023	Coeur d'Alene Press - November 28th, and December 5, 2023 Idaho Press Tribune - November 28th, and December 5, 2023 Idaho State Journal - November 28th, and December 5, 2023 Idaho Statesman - November 29th, and December 6, 2023 Lewiston Tribune - November 29th, and December 6, 2023 Idaho Falls Post Register - November 28th, and December 5, 2023 Magic Valley Times News - November 28th, and December 5, 2023 The draft State Plan is available on Idaho Department of Health and Welfare website (under Food/Cash/Assistance; Home Heating).

IV.7 Miscellaneous

<p>Recipient Business Officer and Recipient Principle Investigator</p> <p>Recipient Business Officer: Lisa Johnson, 208-334-5739, Lisa.Johnson@dhw.idaho.gov</p> <p>Recipient Principle Investigator: Lisa Johnson, 208-334-5739, Lisa.Johnson@dhw.idaho.gov</p> <p><u>DOE 2019 American Customer Satisfaction Index (ACSI) - Action Plan Update</u></p> <p>Idaho communicated a process with the network about areas for program improvement which were identified by CFI Group DOE 2019 American Customer Satisfaction Index (ACSI) and developed an action plan to enhance program management and implement process and quality improvements.</p>

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

We will continue to work with our Direct Service Providers to implement process and quality improvements across the network to include better communication amongst the agencies and a more inclusive state planning process. See the attached ACSI Table.

In accordance with 2 CFR 200.425(a)(2), only those Subgrantees expending more than \$750,000 in total federal funding annually will receive FINANCIAL AUDITS funding identified in the Grantee's SF-424a Budget.

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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

The Idaho Weatherization Program follows the income calculation standards of LIHEAP to determine the types of income included and the time period(s) assessed in the calculation of Total Household Income to determine eligibility.

Describe what household eligibility basis will be used in the Program

Eligible households are defined as households at or below two-hundred percent (200%) of the OMB Poverty guidelines, income eligible for assistance under the Low-Income Home Energy Assistance Program, having received cash assistance payments during the preceding twelve-month period under Titles IV and/or XVI of the Social Security Act, and/or are currently receiving HUD benefits (within the last 12 months) under any of HUD means tested programs.

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

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

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

V.1.2 Approach to Determining Building Eligibility

Procedures to determine that units weatherized have eligibility documentation

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

Prioritization for weatherization services is based on energy burden with special consideration for households comprised of elderly persons, persons with disabilities, and families with children 18 and younger.

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

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

- A list of possible measures that may be installed;
- The residence is not currently for sale by owner of the property, nor is it designated for acquisition or clearance (foreclosure) by federal, state or local programs;
- That rent will not be increased, or renters evicted within 1 year following the completion of the weatherization services performed at the dwelling.

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

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

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

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Describe Reweatherization compliance

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

1. If a dwelling has been damaged by fire, flood, or an act of Nature, and repair of the damage to the weatherization materials is not paid for by insurance.
2. The dwelling may not receive further financial assistance for weatherization until the date that is 15 years after the date previous weatherization was completed using any federal funds, including DOE WAP, LIHEAP, BPA, HUD, or USDA, and
 1. The applicant meets the eligibility criteria for assistance and the Energy Audit takes into account any previous energy conservation; and
 2. The proposed measures and the total job has a SIR \geq 1.0 and does not exceed the DOE average cost per dwelling for the program year.

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

In the event of a state or federally declared natural or manmade disaster or national emergency, Idaho will seek approval from the DOE Project Officer for permission to proceed with a determination of homes available for Re-weatherization. While DOE will continue to require these homes to be reported separately, Grantees may count these homes as completions for the purposes of compliance with the per home expenditure limit in 440.18. Each dwelling unit must receive a new energy audit which considers any previous energy conservation improvements to the dwelling. In compliance with WPN 12-7, these homes can be re-weatherized before the 15-year rolling date requirement.

Describe what structures are eligible for weatherization

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

Describe how Rental Units/Multifamily Buildings will be addressed

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

For example:

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

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

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

1. The Direct Service Provider, as the initial point of contact, will contact the property owner to determine if the rent increase was due to provision of weatherization services to the household.
2. If it is determined by the Direct Service Provider that the rent increase is due to the weatherization measures provided, the

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Department will be notified to send a letter to the property owner explaining program guidelines, specifically that any rent increases within twelve (12) months of weatherization were agreed to per the signature on the Owner/Renter Agreement form.

3. The Direct Service Provider will follow up with the tenant to ensure the rent increase is discontinued to comply with the language on the Owner/Renter Agreement.

Multifamily Units

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

Low Income Subsidized Multi-Family Rental Dwellings

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

Non-Subsidized Multifamily Rental Dwellings

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

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

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

Describe the deferral Process

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

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

Weatherization Readiness Fund Plan

Weatherization Readiness Funds (WRF) will be used to address/prevent deferrals. These funds will be used for DOE WAP jobs where a deferral would normally be required. These funds will allow the identified deferral condition to be corrected so that Weatherization work may begin or resume and must in a DOE completed unit.

- WRF funds will be split between the 6 DSP's.
- Idaho has established the average maximum average cost per unit to be \$10,000.00 per home. Jobs that exceed this average must be reviewed by IDHW before beginning work. DSP's will submit an email to IDHW with the job information and include the expected cost and what measures/repairs will be completed.
- DSPs will document what work will be performed and the cost separately from other DOE funding
- Projects using WRF funding must be completed within 18 months but cannot be outside the current grant cycle (2021-2025).

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- If the job cannot result in a completed DOE unit, other non-federal funding must be utilized.

Allowable use of WRF

The following is a non-comprehensive list of repairs. Items not listed may be allowable if approved by the Grantee:

- Roof repair
 - Repair/ replacement
- Wall repair (interior or exterior)
 - Vinyl siding missing (ex. air sealing or infiltration)
- Ceiling repair
- Floor repair
 - Subfloors install (no carpet or linoleum)
 - Structural issues (ex. floor caving in where water heater is located)
 - Floor joists
- Plumbing repairs
 - Sewer leaks, backups from sewage
 - Larger cost jobs beyond normal H&S allowable costs. (ex: dig outs)
- Electrical repair
- Clean-up or remediation beyond typical scope of WAP
- Lead paint
 - Secure a contractor (EPA certified)
- Asbestos (confirmed or suspected, including vermiculite), mold and/or moisture
 - Secure a contractor (EPA certified)
- Other –
 - Floor/Attic insulation
 - Severe Pest Control issues

Each using WRF funding will follow the same requirements as jobs utilizing weatherization formula funds to document the work completed as stated in the Idaho Weatherization Operations Manual (IWOM). This includes but is not limited to things such as: required permits, work orders, photographs (before and after), receipts, etc. All documentation must be included in the client file.

Idaho will include DOE WRF jobs in their desk monitoring.

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?

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

Five (5) Native American tribes reside within Idaho: Kootenai, Coeur d'Alene, and Nez Perce tribes in the northern part of Idaho, and Shoshone-Bannock and Shoshone-Paiute tribes in southern Idaho. The U.S. Department of Energy allows the Grantee and local Direct Service Providers to provide service to tribal members living on the reservations.

Direct Service Providers are required to serve members of Native American tribes in the same manner and with equal benefit as those services provided to low-income non-tribal members in their respective service areas.

The Grantee will work with Direct Service Providers and encourage shared initiatives with tribal authorities. Direct Service Providers are required to establish a referral system with tribal authorities to ensure that tribal members residing on reservations are adequately and effectively served.

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

V.2 Selection of Areas to Be Served

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

V.3 Priorities

Priority service shall be given to households with:

1. One member who is elderly (age 60 and older), disabled, or a child/children under age 19;
2. Actual annual energy consumption costs that are greater than ten percent (10%) of the household's annual gross income (high energy burden); and
3. Households receiving the highest tier of benefit as part of the Low-Income Home Energy Assistance Program (High Energy Users)

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

V.4 Climatic Conditions

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

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

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SEICAA Georgetown Bear Lake 9,010 6,043

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

V.5 Type of Weatherization Work to Be Done

V.5.1 Technical Guides and Materials

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

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

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

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

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

Idaho will ensure that all weatherization activities not included in the list of Categorical Exclusion activities, per DOE guidance, require an Environmental Questionnaire (EQ-1) submission for review.

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

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

The following language comes from the subgrantee contracts:

“Acceptance and signature on the contract providing DOE PY2024 funding to the subgrantee agency, will serve as proof of receipt of the SWS and Idaho Weatherization Operations Manual (IWOM).”

The Subgrantee must:

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

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

Field guide types approval dates

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

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V.5.2 Energy Audit Procedures

Audit Procedures and Dates Most Recently Approved by DOE

Audit Procedure: Single-Family Audit Name: Other (specify) <div style="border: 1px solid black; padding: 2px;"> The ECOS Energy Audit which incorporates the mechanical/architectural measure interaction requirement of DOE was approved 07/05/2022. ECOS is a web-based platform (Visual Basic.NET) that integrates with Idaho's WITSWeb data tracking system. </div> Approval Date: 6/27/2022
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Audit Procedure: Manufactured Housing Audit Name: Other (specify) <div style="border: 1px solid black; padding: 2px;"> The ECOS Energy Audit which incorporates the mechanical/architectural measure interaction requirement of DOE was approved 07/05/2022. This application is also approved for use when auditing mobile homes. </div> Approval Date: 6/27/2022
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Audit Procedure: Multi-Family Audit Name: Approval Date:
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Comments

The Idaho Weatherization Assistance Program uses a US DOE approved computerized Energy Audit to determine the most cost-effective measures and the savings to investment ratio (SIR) of each measure. The most recent approval of the computerized energy audit by US DOE is July 5, 2022. The Energy Community Online System (ECOS) is described in the Idaho Weatherization Operations Manual (IWOM). Idaho will provide their Energy Audit processes (and priority list(s) if applicable) to DOE for approval every five (5) years. All weatherization activities shall be performed in accordance with the DOE approved energy audit procedures and 10 CFR, Part 440 Appendix A.

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

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

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

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

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

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

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

Fuel Switching

Idaho will consult with DOE when the site-specific energy audit demonstrates the cost effectiveness of the fuel switch over the life of the measure as indicated by the calculated SIR.

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V.5.3 Final Inspection

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

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

The QCI will note deficiencies in the job completion and request follow up on work not meeting State standards and procedures. Any follow up work or additional work, considered 'Go Backs' will not be charged to DOE if the unit has been reported as completed per Department of Energy guidance.

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

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

1. Direct Service Provider program will provide information on how the inadequate practice will be addressed; and
2. The Grantee will take corrective action such as providing T&TA or increasing quality assurance measures until such time when the Direct Service Provider is in compliance with established inspection practices.

To allow flexibility, Idaho will be allowing its Direct Service Providers to either contract with an outside QCI or to certify in-house staff as QCI. Currently, all Direct Service Providers have decided to have in-house staff QCI certified who will be defined as an Independent QCI as per current DOE requirements. The credential requirements for each Direct Service Provider's HEP-Certified staff will be actively monitored and continuing education will be provided on an as needed basis.

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

V.6 Weatherization Analysis of Effectiveness

Idaho has effectively integrated diversity, equity, and inclusion objectives into the weatherization program by ensuring services are available to all citizens of Idaho statewide. Our Policy Advisory Council members represent the interests of underrepresented populations, ensuring our plan to administer weatherization services is fair and inclusive. Outreach to vulnerable populations (elderly, disabled, youth as well as low-income households) is conducted throughout the state, in various formats, to promote

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visibility to these services so all in need can apply and be served. The community action agencies throughout the state and the Grantee foster equal opportunity environments and employ a variety of individuals based on their abilities to serve the citizens of Idaho.

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

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

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

V.7 Health and Safety

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

Idaho's Health and Safety Program expenditures will not exceed fifteen percent (15%) of the Program Operations budget line item. All Direct Service Providers will be held to the Health and Safety budget, regardless of per unit expenditures. This percentage is based on historical spending patterns of Program Operations and Health and Safety. Health and Safety measures, when charged to the Health and Safety line item, will not be included in the average cost per unit calculation. All Direct Service Providers have been provided an electronic copy of the most current DOE guidance.

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

As part of Idaho's Health and Safety plan, Direct Service Provider Staff also use the Idaho Weatherization Deferral Form to assess situations that may be beyond the scope of weatherization.

V.8 Program Management

V.8.1 Overview and Organization

The Idaho Department of Health and Welfare (IDHW), Division of Welfare, is the state agency that applies for Department of Energy Weatherization Assistance Program funding and also functions as Idaho's LIHEAP Grantee. A percentage of three (3) staff persons' time, the Program Manager, a Program Analyst and the Program Specialist, provides administrative oversight, training and technical assistance and reporting functions for this program. Grantee time worked on Wx activities is billed to DOE funding, holiday and sick time is state funded.

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

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

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

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V.8.2 Administrative Expenditure Limits

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

The Grantee will permit Direct Service Providers receiving grants of less than \$350,000 to receive up to an additional five percent (5%) of the new total PY allocation funds, based upon their approved indirect rate or a Cost Allocation Plan and Budget Summary justification.

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

V.8.3 Monitoring Activities

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

Annual on-site visits are completed in accordance with program guidance. The focus of the on-site visits is to conduct random physical inspections of weatherized homes. Based upon the annual review findings, any activities found to be out of compliance will be resolved by the Direct Service Provider as defined in the Idaho Weatherization Operations Manual, Contract Compliance and Remedial Plan.

Idaho 's Grantee performs desktop file reviews following the requirements outlined in the Idaho Weatherization Operations Manual. Idaho's Grantee performs on-site technical monitoring activities. The onsite review ensures that completed projects meets the requirements outlined in the Idaho Weatherization Operations Manual.

The Grantee will coordinate on-site scheduling in a way that minimizes cost and ensures appropriate use of resources. The monitoring for the prior program year will be completed by June 30th annually. Monitoring travel costs will be charged to T&TA and administration.

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

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

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

Monitoring

Monitoring activities comprise three major parts:

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

Idaho will not be utilizing the 'exemplary agency' waiver for the grant period. All Direct Service Providers will receive on-site

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reviews (of completed jobs) and file reviews.

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

WX review:

- | | |
|---|-------------------|
| 1. Community Action Partnership, Inc. | 05/13/24-05/17/24 |
| 2. Eastern Idaho Community Action Partnership, Inc. | 06/10/24-06/14/24 |
| 3. El Ada, Inc. | 04/22/24-04/26/24 |
| 4. Metro Community Services | 05/20/24-05/24/24 |
| 5. South Central Community Action Partnership | 04/29/24-05/03/24 |
| 6. SouthEastern Idaho Community Action Agency, Inc. | 06/17/24-06/21/24 |

Financial/Administrative review:

- | | |
|---|-------------------|
| 1. Community Action Partnership, Inc. | 04/15/24-04/19/24 |
| 2. Eastern Idaho Community Action Partnership, Inc. | 04/22/24-04/26/24 |
| 3. El Ada, Inc. | 05/06/24-05/10/24 |
| 4. Metro Community Services | 05/13/24-05/17/24 |
| 5. South Central Community Action Partnership | 05/20/24-05/24/24 |
| 6. SouthEastern Idaho Community Action Agency, Inc. | 04/29/24-05/03/24 |
| 7. Community Action Partnership of Idaho | 04/08/24-04/12/24 |

Projected Dates of Monitoring Visits

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

Approach

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

Visit

A monitoring exit interview is held for each Direct Service Provider upon completion of the program, on-site quality assurance and participant file review. An initial monitoring report is submitted within fifteen (15) business days. Direct Service Provider responses are due to Idaho's Administrative Contractor within thirty (30) days. Any significant findings require a Quality Improvement Plan to be developed by the Direct Service Provider and submitted within thirty (30) days. Direct Service Provider responses are incorporated into a final monitoring report and all outstanding issues are followed up by Idaho's Administrative Contractor within thirty (30) days after receipt of the final monitoring report. Any noncompliance unresolved within forty-five (45) days will be reported to the DOE Project Officer by the Idaho Department of Health and Welfare. Any sensitive or significant noncompliance findings will be reported to the DOE Project Officer immediately. Please see the Corrective Action/Removal procedures, attached in the document library.

Tracking and Analysis

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

Reporting

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

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V.8.4 Training and Technical Assistance Approach and Activities

Training and Technical Assistance Objective

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

Types of Technical Training

During PY 2024, Subgrantees will evaluate the needs of their staff, conduct self-assessments and review past monitoring reports to determine what training is needed for each WAP employee. Individual training is determined for each employee which aligns with DOE's JTA for their perspective role. Subgrantees will develop a T&TA plan for the upcoming year. In addition, annual monitoring results and visits, program manager meetings (in-person or via teleconference), and release of program guidance will be used to assess Direct Service Provider training needs.

Idaho uses ECOS as our audit tool and will be able to generate reports to show the energy savings achieved from each job and aggregates the savings by different variables. Idaho will be looking at this data annually and reports will be created to share with each subgrantee. These reports will be used to identify training needs.

Idaho encourages all Direct Service Providers to attend industry conferences, including those offered by [Energy OutWest](#) and the National Home Performance Conference, and achieve/maintain QCI certification to ensure Idaho's program is utilizing industry standard technologies and techniques.

Comprehensive Training

Idaho requires completion of Comprehensive Training that aligns with the NREL Job Task Analysis (JTA) for their position(s) for all WAP workers employed in one or more technical positions. Idaho will ensure we are using Interstate Renewable Energy Center (IREC) accredited training providers to administer the training. All Energy Auditor and Quality Control Inspectors will be required to achieve and maintain appropriate Home Energy Professional (HEP) certification, (BA or EA for Energy Auditors, QCI for Quality Control Inspectors) as appropriate to their job tasks. See the attached T&TA planning document that identifies staff training to occur in PY23.

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

Existing technical weatherization staff are required to re-attend comprehensive training for the applicable JTA(s) before attempting to recertify their credentials or within four (4) years for JTAs without a regular certification timeline. New technical staff will be registered for Comprehensive Training within ninety (90) days of achieving permanent full-time employee status. Existing staff assigned to a new position will be registered for applicable Comprehensive Training within ninety (90) days of their reassignment.

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

Specific Training

Subgrantees may receive Specific training pertaining to professional development and program/industry changes. This training is short-term training to address acute deficiencies in the field, single-issue, training, conferences, and program management or leadership training and will be provided on an as needed basis. (Attachment 12).

Direct Service Provider Peer Exchange

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

Other Trainings

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

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

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

As a result of the DOE audit completed in November 2020, Idaho has entered our responses to address concerns in PAGE and has written and attached Corrective Action Plans, as requested in PAGE to provide information on planned actions and projected timelines to address findings and training of weatherization staff, as needed. Some of these findings require T&TA with the direct service providers as a preliminary step. The functionality of new Energy Audit tool, ECOS, that Idaho will be using will also resolve some of DOE's concerns.

The Grantee focuses on identifying program gaps, identify T&TA needs of all subgrantees, performs or coordinates T&TA and tracks T&TA records statewide. We will also utilize them to assist with cross-training direct services providers regarding items of concern identified in the audit.

Client Education

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

Training and Technical Assistance Plan

T & TA Funding Allocation

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

The T&TA budget also includes T&TA needs of the Grantee. This includes costs associated with on-site monitoring.

The Grantee has brought on an additional person who is QCI-certified. This person will complete annual on-site quality assurance monitoring duties.

Provided Training

Needs are assessed with Direct Service Provider Program Managers on an individual basis to identify additional trainings not covered in the statewide prioritization to ensure consistency of service delivery and quality assurance. The DSPs schedule all mandatory trainings and tracks attendance.

Lead Training Certification

New staff hired by the direct service providers will be registered for Lead Safe Work Practice training within ninety (90) days of achieving permanent employee status. All Direct Service Providers must have at least two (2) EPA Certified Lead Renovators on staff. All contractors providing services with DOE funds must have at least one (1) EPA Certified Lead Renovator on staff to ensure compliance with current DOE guidance. All Direct Service Providers are encouraged to train program staff at all levels in OSHA, CPR/First Aid, and general safety procedures.

QCI Certification

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

There are currently fifteen (15) QCI-certified Inspectors in Idaho's Weatherization network of six (6) Direct Service Providers and one (1) QCI-certified Inspector with the Grantee staff for a total of sixteen (16) in Idaho. Each Direct Service Provider is required to have a minimum of one (1) QCI Inspector with the majority of Direct Service Providers having more than one staff person certified.

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

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

A list of QCI-certified staff has been added to the document library.

Training Assessment

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

Training Priority Development

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

The current priorities for training are as follows:

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

Percent of overall trainings

Comprehensive Trainings:	20.0
Specific Trainings:	80.0

Breakdown of T&TA training budget

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

V.9 Energy Crisis and Disaster Plan

In the event of state or federal declared natural or manmade disaster, Idaho may request permission to use DOE WAP resources to provide emergency services to low-income individuals and families in the designated disaster area. Idaho will enlist their existing weatherization network to appropriately follow the Disaster plan as stated in the Idaho Weatherization Operations Manual (IWOM) which follows the DOE program requirements as stated in [WPN 12-7](#).