

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):

3. Date Received

4. Applicant Identifier:

5a. Federal Entity Identifier:

5b. Federal Award Identifier:

DE-SE0001850

State Use Only:

6. Date Received by State:

7. State Application Identifier:

8. APPLICANT INFORMATION:

a. Legal Name: South Carolina State of

b. Employer/Taxpayer Identification Number (EIN/TIN):
576000286c. UEI:
UL2HEZMR7HN1

d. Address:

Street 1: 1205 Pendleton Street

Street 2:

City: Columbia

County: RICHLAND County

State: SC

Province:

Country: U.S.A.

Zip / Postal Code: 292010000

e. Organizational Unit:

Department Name:

South Carolina Department of Administration

Division Name:

Office of Economic Opportunity

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

Prefix: Mr First Name: Matthew

Middle Name:

Last Name: Melton

Suffix:

Title: Senior Manager for Weatherization

Organizational Affiliation: Office of Economic Opportunity Department of Administration

Telephone Number: 8037349861

Fax Number: 8037340356

Email: matthew.melton@admin.sc.gov

APPLICATION FOR FEDERAL ASSISTANCE SF-424

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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-0002025

Title:

2025 Weatherization Assistance Program (WAP) Funding

13. Competition Identification Number:

Title:

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

Statewide

15. Descriptive Title of Applicant's Project:

Weatherization Assistance Funding Opportunity

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16. Congressional District Of:

a. Applicant: South Carolina Congressional District 02

b. Program/Project: SC-Statewide

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

17. Proposed Project:

a. Start Date: 04/01/2025

b. End Date: 06/30/2026

18. Estimated Funding (\$):

| | |
|-------------------|--------------|
| a. Federal | 3,447,950.00 |
| b. Applicant | 0.00 |
| c. State | 0.00 |
| d. Local | 0.00 |
| e. Other | 0.00 |
| f. Program Income | 0.00 |
| g. TOTAL | 3,447,950.00 |

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: Mr First Name: James

Middle Name: E

Last Name: Miller

Suffix:

Title: Director, Office of Economic Opportunity

Telephone Number: 8037340425

Fax Number: 8037340356

Email: James.Miller@admin.sc.gov

Signature of Authorized Representative: Signed Electronically

Date Signed: 07/11/2025

Authorized for Local Reproduction

Standard Form 424 (Revised 10/2005)
Prescribed by OMB Circular A-102

U.S. DEPARTMENT OF ENERGY



BUDGET JUSTIFICATION FOR FORMULA GRANTS

Applicant: South Carolina State of
Award number: SE0001850

Budget period: 04/01/2025 - 06/30/2026

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:

| Position | Description of Duties of Professionals |
|----------------------------------|---|
| Accountant/Fiscal Analyst | Under supervision of the senior manager for fiscal services, assists in the review and approval process of all subgrantee budgets. Prepares various comparative reports on expenditures by funding program(s), provides technical assistance and performs specialized analysis of program fiscal data. Portions of this salary not paid with DOE funds will be paid by state and CSBG funds. |
| Senior Accountant/Fiscal Analyst | Under supervision of the senior manager of fiscal services assist in the technical review of Weatherization Budget, State Plan, allocations to subgrantees, internal controls and required federal reporting. Portions of this salary not paid with DOE funds will be paid by state and CSBG funds. |
| Accounting/Fiscal Manager I | Under supervision of the director, provides supervision of the fiscal monitoring staff and the grants fiscal staff to ensure grants are properly recorded and monitored appropriately. Works with subgrantees to ensure budgets are properly allocated and that federal and state laws and regulations are followed. Portions of this salary not paid with DOE funds will be paid by state and CSBG funds. |
| Administrative Coordinator I | Under supervision of the director, manages the general administrative duties of the office including telephone, personnel files, etc. Portions of this salary not paid with DOE funds will be paid by state funds. |
| Accountant/Fiscal Analyst | Under supervision of the senior manager for fiscal services, assists in the review and approval process of all subgrantee budgets. Prepares various comparative reports on expenditures by funding program(s), provides technical assistance, and performs specialized analysis of program fiscal data. Portions of this salary not paid with DOE funds will be paid by state and CSBG funds. |
| Professional Auditor | Responsible for performing financial monitoring of subgrantees by making on-site field visits to determine financial contract compliance. Performs technical fiscal assistance. Portions of this salary not paid with DOE funds will be paid by state and CSBG funds. |
| Administrative Assistant | Assists with general administration within the office, assists with directing phone calls from constituents with regards to needed services, files contracts and maintains other areas of the office. Portions of this salary not paid with DOE funds will be paid by state funds. |
| Program Coordinator II | Works under the supervision of the senior manager for Weatherization, to ensure the Weatherization Assistance Program operates in accordance with state and federal regulations through monitoring, training and technical assistance. Coordinates and monitors subgrantees. Ensures that minimal requirements are met and work quality remains consistent by subgrantees throughout the state. Performs QCI as a part of the monitoring for the subgrantees. 50% of the salary for this employee will be covered under T&TA. Portions of this salary not paid with DOE funds will be paid by LIHEAP funds. |

| | |
|----------------------------------|--|
| Senior Accountant/Fiscal Analyst | Under supervision of the fiscal services manager, assists in the technical review of Weatherization Budget, State Plan, allocations to subgrantees, internal controls and required federal reporting. Portions of this salary not paid with DOE funds will be paid by LIHEAP and CSBG funds. |
| Program Manager II | Responsible for the overall management of OEO grant programs and staff. Portions of this salary not paid with DOE funds will be paid by LIHEAP and CSBG funds. |
| Accountant/Fiscal Analyst | Under supervision of the senior fiscal manager, assists in the review and approval process of all subgrantee budgets. Prepares various comparative reports on expenditures by funding program(s), provides technical assistance and performs specialized analysis of program fiscal data. Portions of this salary not paid with DOE funds will be paid by LIHEAP and CSBG funds. |
| Attorney III | Responsible for the legal oversight of OEO operations and contracts. Portions of this salary not paid with DOE funds will be paid by LIHEAP and CSBG funds. |
| Professional Auditor | Responsible for performing financial monitoring of subgrantees by making on-site field visits to determine financial contract compliance. Performs technical fiscal assistance. Portions of this salary not paid with DOE funds will be paid by LIHEAP and CSBG funds. |
| Program Manager III | Oversees the Director and operations for the OEO. Portions of this salary not paid with DOE funds will be paid by state, LIHEAP, and CSBG funds. |
| Senior Auditor | Responsible for performing financial monitoring of subgrantees by making on-site field visits to determine financial contract compliance. Performs technical fiscal assistance. Portions of this salary not paid with DOE funds will be paid by LIHEAP and CSBG funds. |
| Senior Auditor | Responsible for performing financial monitoring of subgrantees by making on-site field visits to determine financial contract compliance. Performs technical fiscal assistance. Portions of this salary not paid with DOE funds will be paid by state, LIHEAP, and CSBG funds. |
| Program Manager I | Under supervision of the agency director, manages the development and coordination of the WAP State Plan, including development of procedures and objectives for program, as well as implementing program procedures in accordance with federal and state regulations and guidelines. Supervises staff whose duties include monitoring and specialized training and technical assistance. Serves as program liaison. 29.25 percent of this salary will be covered as administration since this is the lead person responsible for the grant. The balance is paid from the T&TA fund. This position works on the budget, coordinates with the office staff to procure goods and services, and provides other administrative duties for the grant in addition to monitoring subrecipients. |
| Program Coordinator II | Works under the supervision of the senior manager for Weatherization, to ensure the Weatherization Assistance Program operates in accordance with state and federal regulations through monitoring. Assists with writing and updating state plan WAP Policies and Procedures. Salary paid entirely with WAP Administrative funds. |

Direct Personnel Compensation:

| Position | Salary/Rate | Time | Direct Pay |
|----------|-------------|------|------------|
|----------|-------------|------|------------|

| | | | |
|----------------------------------|--------------|---------------|--------------|
| Accountant/Fiscal Analyst | \$65,000.00 | 2.5003 % FT | \$1,625.20 |
| Senior Accountant/Fiscal Analyst | \$63,000.00 | 2.0002 % FT | \$1,260.13 |
| Accounting/Fiscal Manager I | \$95,000.00 | 2.0001 % FT | \$1,900.10 |
| Administrative Coordinator I | \$53,000.00 | 2.0003 % FT | \$1,060.16 |
| Accountant/Fiscal Analyst | \$50,000.00 | 2.0003 % FT | \$1,000.15 |
| Professional Auditor | \$50,000.00 | 2.0003 % FT | \$1,000.15 |
| Administrative Assistant | \$35,000.00 | 2.0004 % FT | \$700.14 |
| Program Coordinator II | \$70,000.00 | 50.0003 % FT | \$35,000.21 |
| Senior Accountant/Fiscal Analyst | \$80,000.00 | 6.5002 % FT | \$5,200.16 |
| Program Manager II | \$95,000.00 | 2.0001 % FT | \$1,900.10 |
| Accountant/Fiscal Analyst | \$50,000.00 | 2.0003 % FT | \$1,000.15 |
| Attorney III | \$75,000.00 | 2.0001 % FT | \$1,500.08 |
| Professional Auditor | \$53,701.00 | 2.5003 % FT | \$1,342.69 |
| Program Manager III | \$118,450.00 | 1.0001 % FT | \$1,184.62 |
| Senior Auditor | \$80,000.00 | 2.0000 % FT | \$1,600.00 |
| Senior Auditor | \$55,000.00 | 1.9003 % FT | \$1,045.16 |
| Program Manager I | \$76,000.00 | 70.7502 % FT | \$53,770.15 |
| Program Coordinator II | \$60,000.00 | 100.0000 % FT | \$60,000.00 |
| Direct Pay Total | | | \$172,089.35 |

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.

Social Security

7.65%

Workers Compensation

1.00%

Unemployment

0.12%

Health Insurance

15.00%

Dental Insurance

0.3%

Pre-retirement Death

0.2%

Retirement

16.00%

Retirement - Optional Retirement Plan

2.00%

42.27%

A new IDC rate has not been approved. The proposed IDC rate provided as of 2021 is the most recent IDC rate and the one currently in use. The SC Office of Economic Opportunity (OEO) is under the Department of Administration which submits the proposals for new IDC rates. When a new rate is submitted and or approved, OEO will notify DOE.

Fringe Benefits Calculations

| Position | Direct Pay | Rate | Benefits |
|----------------------------------|-------------|-----------|-------------|
| Accountant/Fiscal Analyst | \$1,625.20 | 42.2700 % | \$686.97 |
| Senior Accountant/Fiscal Analyst | \$1,260.13 | 42.2700 % | \$532.66 |
| Accounting/Fiscal Manager I | \$1,900.10 | 42.2700 % | \$803.17 |
| Administrative Coordinator I | \$1,060.16 | 42.2700 % | \$448.13 |
| Accountant/Fiscal Analyst | \$1,000.15 | 42.2700 % | \$422.76 |
| Professional Auditor | \$1,000.15 | 42.2700 % | \$422.76 |
| Administrative Assistant | \$700.14 | 42.2700 % | \$295.95 |
| Program Coordinator II | \$35,000.21 | 42.2700 % | \$14,794.59 |
| Senior Accountant/Fiscal Analyst | \$5,200.16 | 42.2700 % | \$2,198.11 |
| Program Manager II | \$1,900.10 | 42.2700 % | \$803.17 |
| Accountant/Fiscal Analyst | \$1,000.15 | 42.2700 % | \$422.76 |
| Attorney III | \$1,500.08 | 42.2700 % | \$634.08 |
| Professional Auditor | \$1,342.69 | 42.2700 % | \$567.56 |
| Program Manager III | \$1,184.62 | 42.2700 % | \$500.74 |
| Senior Auditor | \$1,600.00 | 42.2700 % | \$676.32 |
| Senior Auditor | \$1,045.16 | 42.2700 % | \$441.79 |
| Program Manager I | \$53,770.15 | 42.2700 % | \$22,728.64 |
| Program Coordinator II | \$60,000.00 | 42.2700 % | \$25,362.00 |
| Fringe Benefits Total | | | \$72,742.16 |

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.

| Purpose of Trip | Number of Trips | Cost Per Trip | Total |
|---|-----------------|---------------|-------------|
| The NASCSP Winter Training Conference will be held in Arlington, Virginia in February or March of 2026. OEO will pay for four weatherization staff members to attend. Estimate includes airfare (\$300), hotel for three nights (\$800), registration (\$300), and meals (\$100). | 4 | \$2,000.00 | \$8,000.00 |
| Monitoring Visits There are six Community Action Agencies which will require overnight travel for four people to complete the program, technical, and fiscal monitoring. Each monitoring visit will consist two to three days. This amount covers the cost of hotel at no more than the federal GSA rate, and meal expense that cannot exceed \$35 per day, based on state law. | 4 | \$2,200.00 | \$8,800.00 |
| OEO will conduct and contract out training two times per year during the Spring (April 2025) and Fall (November 2025) State Conference sponsored by the South Carolina Association of Community Action Partnerships (SCACAP). Four weatherization staff members will attend. This includes hotel, meals, for OEO staff as well as hotel and travel costs for trainers. | 4 | \$5,000.00 | \$20,000.00 |
| The NASCSP Annual Conference will be held in Chicago, Illinois in September 2025. OEO will pay for four weatherization staff members to attend. Estimate includes airfare (\$600), hotel for three nights (\$1000), registration (\$300), and meals (\$100). | 4 | \$2,500.00 | \$10,000.00 |

| | | | |
|---|---|------------|-------------|
| The National Home Performance Conference will be held in New Orleans, Louisiana in April 2025. OEO will pay for four OEO weatherization staff member to attend. Estimate includes airfare (\$500), hotel for four nights (\$1000), registration (\$400), and meals (\$100). | 4 | \$2,000.00 | \$8,000.00 |
| Travel Total | | | \$54,800.00 |

- 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.

Monitoring Visits

This estimate is based on previous year's travel costs. The maximum meal reimbursement for in-state travel is \$35 per day. Hotel costs are based on the GSA rate for South Carolina which ranges from \$110 to \$244 per night depending on the city and time of year.

Out of State Conference Travel

This estimate is based on the previous year's travel costs to NASCSP and NHPC. The maximum meal reimbursement for out-of-state travel is \$50 per day. Hotel costs are based on the GSA rate for the conference host city. The GSA rate for New Orleans in April is \$179 per night, Chicago in September is \$223 per night, and Washington DC in February is \$196 per night.

In State Conference Travel

This estimate is based on the previous year's travel costs to SCACAP. The maximum meal reimbursement for in-state travel is \$35 per day. Hotel costs are based on the GSA rate for the conference host city. The GSA rate for Myrtle Beach in November is \$110 per night. The GSA rate for Greenville in April is \$110 per night.

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> |
|------------------|------------------|---------------|-------------------|------------------------------|
|------------------|------------------|---------------|-------------------|------------------------------|

- 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> |
|-------------------------|-------------|--|
| Operational Costs | \$3,600.00 | WAP specific training materials handed out during Weatherization sessions at the Spring and Fall Statewide Conferences as well as items used during monitoring including disposable suits and booties are billed directly to the WAP grant. These estimated costs are based on prior purchases of similar items. |

| | | |
|------------------------------|-------------|---|
| Lead Paint Testing Kit | \$1,000.00 | Used when monitoring to determine presence of lead paint in dwellings built before 1978. 100 kits x \$10 |
| Crawlspace Inspection Robot | \$5,200.00 | Tracked robot with camera and remote controls for inspecting crawlspaces with low clearance. Includes \$4,950 for robot, \$50 for additional battery, and \$200 for delivery. |
| Office Supplies | \$1,500.00 | The cost of advertising and transcribing the WAP State Plan public hearing are billed directly to the WAP grant. This estimated cost is based on costs from prior years. |
| Materials and Supplies Total | \$11,300.00 | |

- 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.

Cost Basis - Prior purchases of similar or like items.

Training Materials - \$1,500 (x 2 conferences)

Tyvek Suits - \$20 (x20)

Booties - \$10 (x 20)

Transcripts for Public Hearing and Policy Advisory Committee Meeting - \$500 per transcript (x2)

Advertising in The State Newspaper - \$500

Lead Paint Testing Kits - \$10

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* |
|--|-------------------|--|
| LITT Help | \$15,000.00 | Grantee T&TA funds - Amount is based on the new contract award and a change in the break down anticipated for weatherization with software updates. This vendor provides on-site and phone assistance to the Weatherization Sub-grantees for LITT. Cost estimate is based on previous contract with entity. |
| Lowcountry Community Action Agency | \$82,614.00 | \$10,327 is awarded for administration, \$6,100 is awarded as T&TA, \$5,300 is awarded as Health & Safety, \$39,548 is awarded for program operations, and \$21,339 is awarded as Weatherization Readiness. Of the new funding, \$82,614, only 12.5% may be used for administration. Counties served Colleton and Hampton. Funds are allocated based on the most recent census poverty level data for each subgrantee. |
| Chesterfield Marlboro Economic Opportunity Council | \$204,243.00 | \$25,531 is awarded for administration, \$16,149 is awarded as T&TA, \$14,354 is awarded as Health & Safety, \$112,645 is awarded for program operations, and \$35,564 is awarded as Weatherization Readiness. Of the new funds awarded, \$204,243, only 12.5% may be used for administration. Counties served Chesterfield, Darlington, Dillon, Marlboro. Funds are allocated based on the most recent census poverty level data for each subgrantee. |

| | | |
|---|--------------|--|
| GLEAMNS Human Resources Commission | \$597,627.00 | \$44,822 is awarded for administration, \$56,524 is awarded as T&TA, \$59,347 is awarded as Health & Safety, \$394,257 is awarded for program operations, and \$42,677 is awarded as Weatherization Readiness. Of the new funds awarded, \$597,627, only 7.5% may be used for administration. Counties served Abbeville, Anderson, Cherokee, Edgefield, Greenwood, Laurens, McCormick, Newberry, Oconee, Pickens, Saluda, Spartanburg. Funds are allocated based on the most recent census poverty level data for each subgrantee. |
| Scott and Company CPA | \$20,000.00 | Administrative funds are used to cover the cost for outside accounting firm to provide additional financial monitoring to 4 of the agencies which run a weatherization program. The cost of fiscal monitoring is split among LIHEAP, CSBG, and DOE Weatherization grants. Cost estimate is based on previous contracts with entity. |
| Waccamaw Economic Opportunity Council | \$280,845.00 | \$35,106 is awarded for administration, \$24,636 is awarded as T&TA, \$23,592 is awarded as Health & Safety, \$169,060 is awarded for program operations, and \$28,451 is awarded as Weatherization Readiness. Of the new funds awarded, \$280,845, only 12.5% may be used for administration. Counties served Georgetown, Horry, Williamsburg. Funds are allocated based on the most recent census poverty level data for each subgrantee. |
| Aiken/Barnwell Counties Community Action Agency | \$819,815.00 | \$61,486 is awarded for administration, \$77,105 is awarded as T&TA, \$81,273 is awarded as Health & Safety, \$528,823 is awarded for program operations, and 71,128 is awarded as Weatherization Readiness. Of the new funds awarded, \$819,815, only 7.5% may be used for administration. Counties served Aiken, Allendale, Bamberg, Barnwell, Calhoun, Greenville, Lexington, Orangeburg, Richland. Funds are allocated based on the most recent census poverty level data for each subgrantee. |
| Carolina Community Actions | \$209,694.00 | \$26,212 is awarded for administration, \$18,841 is awarded as T&TA, \$18,996 is awarded as Health & Safety, \$131,419 is awarded for program operations, and \$14,226 is awarded as Weatherization Readiness. Of the new funds awarded, \$209,694, only 12.5% may be used for administration. Counties served are Chester, Fairfield, Lancaster, Union, York. Funds are allocated based on the most recent census poverty level data for each subgrantee. |

| | | |
|----------------------------------|--------------|---|
| Wateree Community Actions | \$268,631.00 | \$33,579 is awarded for administration, \$24,750 is awarded as T&TA, \$24,776 is awarded as Health & Safety, \$171,300 is awarded for program operations, and \$14,226 is awarded as Weatherization Readiness. Of the new funds awarded, \$268,631, only 12.5% may be used for administration. Counties served Clarendon, Florence, Kershaw, Lee, Marion, Sumter. Funds are allocated based on the most recent census poverty level data for each subgrantee. |
| Charleston County Human Services | \$522,641.00 | \$39,198 is awarded for administration, \$45,800 is awarded as T&TA, \$45,143 is awarded as Health & Safety, \$321,372 is awarded for program operations, and \$71,128 is awarded as Weatherization Readiness. Of the new funds awarded, \$522,641, only 7.5% may be used for administration. Counties served Beaufort, Berkley, Charleston, Dorchester, Jasper. Funds are allocated based on the most recent census poverty level data for each subgrantee. |
| JLC Industries | \$10,000.00 | Grantee T&TA - OEO has a contract with JLC Industries to conduct ad hoc trainings throughout the year. Cost estimate is based on current contract with entity. Costs vary depending on type and length of training. |
| Apple Energy | \$8,000.00 | Grantee T&TA - OEO has a contract with Apple Energy to conduct ad hoc trainings throughout the year. Cost estimate is based on current contract with entity. Costs vary depending on type and length of training. |
| LITT Software Annual License | \$25,000.00 | Grantee Admin - These funds will be used to offset cost of the annual software cost for the database used to track finances and program operations for the agencies that provide weatherization services. Cost estimate is based on previous contract with entity. |
| Apple Energy | \$25,000.00 | Grantee Admin - Apple Energy is contracted with OEO to conduct ad hoc QCI inspections. Cost estimate based on current contract with entity (\$1000 per QCI including write up with SWS citations). |
| Contracts and Subgrants Total | | \$3,089,110.00 |

*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 |
|---------------------|------|-----------------------|
|---------------------|------|-----------------------|

| | | |
|---|-------------|---|
| Dues NEADA & National Association for State Community Services | \$10,000.00 | These dues are paid from Administrative funds. These organizations advocate on behalf of the weatherization programs throughout the nation, as well as provide training and technical assistance to OEO. Being a member gives OEO a source for additional education, training materials and expertise that is not held by staff members. This amount is split between WAP and CSBG grants. The amount listed here is WAP's share and is billed directly to the WAP grant. |
| Insurance | \$8,000.00 | Administrative funds to cover the cost of WAP vehicle insurance for two Dodge vehicles, and general liability insurance coverage. These vehicles are used exclusively by weatherization. This amount is billed directly to the WAP grant. |
| Rent - Admin Office | \$10,000.00 | Covers the cost of administration office for Weatherization. The amount is based on the percentage of square feet occupied by weatherization staff in the office. This amount is billed directly to the WAP grant. |
| Other Direct Costs Total | \$28,000.00 | |

- 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 Charges 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.

Cost estimates are based on prior purchases.

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.
- 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.
- A new IDC rate has not been approved. OEO will utilize the de minimis rate until a new rate has been approved. OEO does not have a substantial amount of indirect costs and for Program Year 2025 will not reach the de minimis rate maximum of 15%. OEO will use an Indirect Cost rate of 4.505%. When a new rate is approved, OEO will notify DOE.

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

Name: Renee Rochester

Phone Number: 8037370523

Indirect costs calculations:

| Indirect Cost Account | Direct Total | Indirect Rate | Total Indirect |
|------------------------|--------------|----------------------|----------------|
| Grantee T&TA | \$287,294.00 | 4.5050 % | \$12,942.59 |
| Grantee Administration | \$154,637.00 | 4.5050 % | \$6,966.40 |
| | | Indirect Costs Total | \$19,908.99 |

BUDGET INFORMATION - Non-Construction Programs

| | | | |
|---|--|---|--|
| 1. Program/Project Identification No. SE0001850 | | 2. Program/Project Title Weatherization Assistance Program | |
| 3. Name and Address South Carolina State of 1205 Pendleton Street Columbia, SC 292010000 | | 4. Program/Project Start Date 04/01/2025 | |
| | | 5. Completion Date 06/30/2026 | |

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 | | \$ 3,447,950.00 | | \$ 3,447,950.00 |
| 2. | | | | | | |
| 3. | | | | | | |
| 4. | | | | | | |
| 5. TOTAL | | \$ 0.00 | \$ 0.00 | \$ 3,447,950.00 | \$ 0.00 | \$ 3,447,950.00 |

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 | \$ 32,745.00 | \$ 0.00 | \$ 139,344.00 | \$ 0.00 | \$ 172,089.00 |
| b. Fringe Benefits | \$ 12,592.00 | \$ 0.00 | \$ 60,150.00 | \$ 0.00 | \$ 72,742.00 |
| c. Travel | \$ 0.00 | \$ 0.00 | \$ 54,800.00 | \$ 0.00 | \$ 54,800.00 |
| d. Equipment | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| e. Supplies | \$ 11,300.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 11,300.00 |
| f. Contract | \$ 70,000.00 | \$ 276,261.00 | \$ 33,000.00 | \$ 269,905.00 | \$ 3,089,110.00 |
| g. Construction | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| h. Other Direct Costs | \$ 28,000.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 28,000.00 |
| i. Total Direct Charges | \$ 154,637.00 | \$ 276,261.00 | \$ 287,294.00 | \$ 269,905.00 | \$ 3,428,041.00 |
| j. Indirect Costs | \$ 6,966.00 | \$ 0.00 | \$ 12,943.00 | \$ 0.00 | \$ 19,909.00 |
| k. Totals | \$ 161,603.00 | \$ 276,261.00 | \$ 300,237.00 | \$ 269,905.00 | \$ 3,447,950.00 |
| 7. Program Income | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |

BUDGET INFORMATION - Non-Construction Programs

| | | | |
|---|--|---|--|
| 1. Program/Project Identification No. SE0001850 | | 2. Program/Project Title Weatherization Assistance Program | |
| 3. Name and Address South Carolina State of 1205 Pendleton Street Columbia, SC 292010000 | | 4. Program/Project Start Date 04/01/2025 | |
| | | 5. Completion Date 06/30/2026 | |

| 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 | \$ 3,447,950.00 | \$ 0.00 | \$ 3,447,950.00 |

| SECTION B - BUDGET CATEGORIES | | | | | |
|-------------------------------|-------------------------------------|------------------------|-------------------------|------------------------------|------------------|
| 6. Object Class Categories | Grant Program, Function or Activity | | | | Total (5) |
| | (1) HEALTH AND SAFETY | (2) PROGRAM OPERATIONS | (3) LIABILITY INSURANCE | (4) Weatherization Readiness | |
| a. Personnel | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 172,089.00 |
| b. Fringe Benefits | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 72,742.00 |
| c. Travel | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 54,800.00 |
| d. Equipment | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| e. Supplies | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 11,300.00 |
| f. Contract | \$ 272,781.00 | \$ 1,868,424.00 | \$ 0.00 | \$ 298,739.00 | \$ 3,089,110.00 |
| g. Construction | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| h. Other Direct Costs | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 28,000.00 |
| i. Total Direct Charges | \$ 272,781.00 | \$ 1,868,424.00 | \$ 0.00 | \$ 298,739.00 | \$ 3,428,041.00 |
| j. Indirect Costs | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 19,909.00 |
| k. Totals | \$ 272,781.00 | \$ 1,868,424.00 | \$ 0.00 | \$ 298,739.00 | \$ 3,447,950.00 |
| 7. Program Income | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |

U.S. Department of Energy
WEATHERIZATION ASSISTANCE PROGRAM
SUBGRANTEE INFORMATION
State: SC Grant Number: SE0001850 Program Year: 2025

| | | | | | |
|------------------|--|-----------------------|---------------|------------------------------------|-------|
| Name: | Aiken/Barnwell Counties Community Action Agency | | Contact: | George A. Anderson, Exec. Director | |
| | | | UEI: | MC9KMKKDMJ45 | |
| | | | DUNS: | 082918215 | |
| Address: | PO Box 2066 | | Phone: | (803) 648-6836 | |
| | 291 Beaufort Street | | Fax: | (803) 649-1588 | |
| | Aiken, SC 29802-2066 | | Email: | gaed291@gmail.com | |
| Counties served: | GREENVILLE County | Tentative allocation: | \$ 819,815.00 | Congressional | CD |
| | ORANGEBURG County | Planned units: | 62 | districts served: | SC-02 |
| | LEXINGTON County | Type of organization: | Local agency | | SC-04 |
| | CALHOUN County | | | | SC-06 |
| | AIKEN County | | | | |
| | ALLENDALE County | | | | |
| | BAMBERG County | | | | |
| | BARNWELL County | | | | |
| | RICHLAND County | | | | |
| | Source of labor: Contractors | | | | |

| | | | | | |
|------------------|---|-----------------------|---------------|---|-------|
| Name: | Carolina Community Actions, Inc. | | Contact: | Karen Brackett Browning, Exec. Director | |
| | | | UEI: | MNR3F6N2SME5 | |
| | | | DUNS: | 071061212 | |
| Address: | P O Box 933 | | Phone: | (803) 329-5195 | |
| | 138 South Oakland Avenue | | Fax: | (803) 329-5198 | |
| | Rock Hill, SC 29731-6933 | | Email: | kbrackett-browning@ccainc.org | |
| Counties served: | CHESTER County | Tentative allocation: | \$ 209,694.00 | Congressional | CD |
| | FAIRFIELD County | Planned units: | 16 | districts served: | SC-05 |
| | LANCASTER County | Type of organization: | Local agency | | SC-04 |
| | UNION County | | | | |
| | YORK County | | | | |
| | Source of labor: Contractors | | | | |

| | | | | | |
|------------------|---|-----------------------|---------------|--------------------------------------|-------|
| Name: | Charleston County Human Services Commission dba Palmetto | | Contact: | Caddell E. Singleton, Exec. Director | |
| | | | UEI: | JFYNKD7HD834 | |
| | | | DUNS: | 180078052 | |
| Address: | 1069 King Street | | Phone: | (843) 724-6760 | |
| | PO Box 20968 | | Fax: | (843) 724-6787 | |
| | Charleston, SC 29413-0000 | | Email: | csingleton@palmettocap.org | |
| Counties served: | DORCHESTER County | Tentative allocation: | \$ 522,641.00 | Congressional | CD |
| | BEAUFORT County | Planned units: | 38 | districts served: | SC-01 |
| | BERKELEY County | Type of organization: | Local agency | | SC-06 |
| | CHARLESTON County | | | | |
| | JASPER County | | | | |
| | Source of labor: Agency and Contractors | | | | |

U.S. Department of Energy
WEATHERIZATION ASSISTANCE PROGRAM
SUBGRANTEE INFORMATION
State: SC Grant Number: SE0001850 Program Year: 2025

| | | | |
|---|---|--|--|
| Name: Chesterfield-Marlboro | | Contact: Samuel D. Bass, Jr., Exec. Director | |
| | | UEI: H4KKYZ9X7J33 | |
| | | DUNS: 874970627 | |
| Address: 318-322 Front Street | | Phone: (843) 320-9760 | |
| Cheraw, SC 29520-0000 | | Fax: (843) 320-9771 | |
| | | Email: sdbass@cmeoc.org | |
| Counties served: | MARLBORO County CHESTERFIELD County DARLINGTON County DILLON County | Tentative allocation: \$ 204,243.00 Planned units: 14 Type of organization: Local agency Source of labor: Contractors | Congressional districts served: <u>CD</u> SC-05 SC-07 |
| | | | |
| Name: GLEAMNS Human Resources Commission Inc | | Contact: Shunna T. Vance, Exec. Director | |
| | | UEI: S6MMXBQ98E68 | |
| | | DUNS: 078070497 | |
| Address: P O Box 1326 | | Phone: (864) 223-8434 | |
| 237 Hospital Street | | Fax: (864) 223-9456 | |
| Greenwood, SC 29648-0000 | | Email: svance@gleamnshrc.org | |
| Counties served: | GREENWOOD County MCCORMICK County LAURENS County PICKENS County NEWBERRY County OCONEE County ABBEVILLE County EDGEFIELD County ANDERSON County CHEROKEE County SALUDA County SPARTANBURG County | Tentative allocation: \$ 597,627.00 Planned units: 46 Type of organization: Local agency Source of labor: Contractors | Congressional districts served: <u>CD</u> SC-04 SC-03 SC-05 |
| | | | |
| Name: Lowcountry Community Action Agency, Inc. | | Contact: Tara Glover Executive Director | |
| | | UEI: M4HNC173GJP5 | |
| | | DUNS: 071408165 | |
| Address: 1605 Jeffries Blvd | | Phone: (843) 549-5576 | |
| Walterboro, SC 29488-0000 | | Fax: (843) 549-2190 | |
| | | Email: tara.glover@lowcountrycaa.org | |
| Counties served: | COLLETON County HAMPTON County | Tentative allocation: \$ 82,614.00 Planned units: 8 Type of organization: Local agency Source of labor: Contractors | Congressional districts served: <u>CD</u> SC-02 SC-06 |

U.S. Department of Energy
WEATHERIZATION ASSISTANCE PROGRAM
SUBGRANTEE INFORMATION
State: SC Grant Number: SE0001850 Program Year: 2025

Name: **Waccamaw Economic Opportunity Council, Inc.**

Contact: James L. Pasley, Jr., Exec. Director

UEI: L96VLJNNJNB8

DUNS: 130046845

Address: Post Office Box 1467
1261 Hwy. 501 East, Suite B
Conway, SC 29528-0000

Phone: (843) 234-4100

Fax: (843) 234-4111

Email: james.pasley@weoc.org

Counties served: HORRY County
GEORGETOWN County
WILLIAMSBURG County

Tentative allocation: \$ 280,845.00

Planned units: 20

Type of organization: Local agency

Source of labor: Contractors

| | |
|-------------------|-------|
| Congressional | CD |
| districts served: | SC-06 |
| | SC-07 |

Name: **Wateree Community Actions, Inc.**

Contact: Annette Tucker, Exec. Director

UEI: KCY9AB9Q74L5

DUNS: 086375599

Address: 1915 Harden Street
Columbia, SC 29204-0000

Phone: (803) 807-9811

Fax: (803) 807-9810

Email: atucker@wcai.org

Counties served: SUMTER County
CLARENDON County
LEE County
MARION County
FLORENCE County
KERSHAW County

Tentative allocation: \$ 268,631.00

Planned units: 21

Type of organization: Local agency

Source of labor: Contractors

| | |
|-------------------|-------|
| Congressional | CD |
| districts served: | SC-06 |
| | SC-07 |
| | SC-05 |

U.S. Department of Energy
Weatherization Assistance Program (WAP)
WEATHERIZATION ANNUAL FILE WORKSHEET
Grant Number: SE0001850, **State:** SC, **Program Year:** 2025
Recipient: South Carolina State of

IV.1 Subgrantees

| Subgrantee (City) | Planned Funds/Units |
|---|-------------------------------------|
| Aiken/Barnwell Counties Community Action Agency (Aiken) | \$819,815.00 62 |
| Carolina Community Actions, Inc. (Rock Hill) | \$209,694.00 16 |
| Charleston County Human Services Commission dba Palmetto (Charleston) | \$522,641.00 38 |
| Chesterfield-Marlboro (Cheraw) | \$204,243.00 14 |
| GLEAMNS Human Resources Commission Inc (Greenwood) | \$597,627.00 46 |
| Lowcountry Community Action Agency, Inc. (Walterboro) | \$82,614.00 8 |
| Waccamaw Economic Opportunity Council, Inc. (Conway) | \$280,845.00 20 |
| Wateree Community Actions, Inc. (Columbia) | \$268,631.00 21 |
| Total: | \$2,986,110.00 225 |

IV.2 WAP Production Schedule

| | | |
|--|---|----------------|
| Weatherization Plans | | Units |
| Total Units (excluding reweatherized) | | 225 |
| Rewatherized 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 | 225 |
| C | Total Units Reweatherized | 0 |
| D | Total Dwelling Units to be Weatherized and Reweatherized (B + C) | 225 |
| 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 | \$1,868,424.00 |
| G | Total Dwelling Units to be Weatherized and Reweatherized (from line D) | 225 |
| H | Average Program Operations Costs per Unit (F divided by G) | \$8,304.11 |
| I | Average Vehicles & Equipment Acquisition Cost per Unit (from line E) | \$0.00 |
| J | Total Average Cost per Dwelling (H plus I) | \$8,304.11 |

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 |

U.S. Department of Energy
Weatherization Assistance Program (WAP)
WEATHERIZATION ANNUAL FILE WORKSHEET
Grant Number: SE0001850, **State:** SC, **Program Year:** 2025
Recipient: South Carolina State of

| | | | |
|---------------------|-----|------|------|
| This Year Estimate | 225 | 29.3 | 6592 |
| Prior Year Estimate | 188 | 29.3 | 5508 |
| Prior Year Actual | 247 | 29.3 | 7237 |

Method used to calculate savings description:

IV.4 DOE-Funded Leveraging Activities

The State will not be leveraging any funds.

IV.5 Policy Advisory Council Members

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

| | |
|---------------------|---|
| Cathy Seawright | Type of organization: Unit of Federal Government Contact Name: Cathy Seawright Phone: 8432533093 Email: cathy.seawright@usda.gov |
| Evans Taylor | Type of organization: Utility Contact Name: Evans Taylor Phone: 9197915906 Email: evans.taylor@duke-energy.com |
| Gretchen Pool | Type of organization: Unit of State Government Contact Name: Phone: 8037370800 Email: gpool@ors.sc.gov |
| Jennifer Moore | Type of organization: Non-profit (not a financial institution) Contact Name: Jennifer Moore Phone: 8037335421 Email: jmoore@uway.org |
| John Frick | Type of organization: Utility Contact Name: John Frick Phone: 8037393064 Email: john.frick@ecsc.org |
| Kaytee Watson | Type of organization: Utility Contact Name: Phone: 8032177942 Email: kaytee.watson@dominionenergy.com |
| Lacey O'Neil | Type of organization: Utility Contact Name: Phone: 9198154072 Email: lacey.o'neil@duke-energy.com |
| Samuel D. Bass, Jr. | Type of organization: Local agency Contact Name: Phone: 8433209760 Email: sdbass@cmeoc.org |
| Trish Jerman | Type of organization: Other Contact Name: Trish Jerman Phone: 8033151609 Email: trish.jerman@gmail.com |
| Yvette Rowland | Type of organization: Utility Contact Name: Yvette Rowland Phone: 8037710220 Email: yvette.rowland@santecooper.com |

U.S. Department of Energy
Weatherization Assistance Program (WAP)
WEATHERIZATION ANNUAL FILE WORKSHEET
Grant Number: SE0001850, **State:** SC, **Program Year:** 2025
Recipient: South Carolina State of

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 |
|------------|---|
| 01/27/2025 | A public hearing will be held on January 27, 2025 to review the Program Year 2025 Weatherization Assistance Program State Plan. Notice of the public hearing was published in the statewide daily publication of The State Newspaper on January 17, 2025. |

IV.7 Miscellaneous

Average Cost Per Unit (ACPU)

The ACPU for PY 2025 is \$8,547.

Recipient Principal Investigator

Matthew Melton

matthew.melton@admin.sc.gov

803-734-9861

Recipient Business Officer

James Miller

james.miller@admin.sc.gov

803-734-0425

Policy Advisory Committee Representation

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

Monthly Quotas

To ensure annual production quotas are met and provide consistent work for contractors, OEO is implementing monthly production quotas as outlined below.

| | July 2025 | August 2025 | September 2025 | October 2025 | November 2025 | December 2025 |
|-----------------------|-----------|-------------|----------------|--------------|---------------|---------------|
| Aiken-Barnwell | 0 | 3 | 6 | 6 | 7 | 7 |
| Carolina | 0 | 1 | 1 | 1 | 2 | 2 |
| Chesterfield-Marlboro | 0 | 1 | 1 | 1 | 1 | 1 |
| GLEAMNS | | 3 | 4 | 4 | 4 | 4 |
| Lowcountry | 0 | 0 | 0 | 1 | 1 | 1 |
| Palmetto | 0 | 3 | 3 | 3 | 3 | 3 |
| Waccamaw | 0 | 2 | 2 | 2 | 2 | 2 |
| Wateree | 0 | 2 | 2 | 2 | 2 | 2 |

| | January 2026 | February 2026 | March 2026 | April 2026 | May 2026 | June 2026 | Total |
|-----------------------|--------------|---------------|------------|------------|----------|-----------|-------|
| Aiken-Barnwell | 7 | 6 | 5 | 5 | 5 | 5 | 62 |
| Carolina | 2 | 2 | 2 | 1 | 1 | 1 | 16 |
| Chesterfield-Marlboro | 1 | 2 | 2 | 1 | 1 | 2 | 14 |
| GLEAMNS | 4 | 5 | 5 | 5 | 4 | 4 | 46 |

U.S. Department of Energy
Weatherization Assistance Program (WAP)
WEATHERIZATION ANNUAL FILE WORKSHEET
Grant Number: SE0001850, **State:** SC, **Program Year:** 2025
Recipient: South Carolina State of

| | | | | | | | | |
|------------|---|---|---|---|---|---|----|--|
| Lowcountry | 1 | 1 | 0 | 1 | 1 | 1 | 8 | |
| Palmetto | 3 | 4 | 4 | 4 | 4 | 4 | 38 | |
| Waccamaw | 2 | 2 | 2 | 2 | 1 | 1 | 20 | |
| Wateree | 2 | 2 | 2 | 2 | 2 | 1 | 21 | |

U.S. Department of Energy
Weatherization Assistance Program (WAP)
STATE PLAN / MASTER FILE WORKSHEET
Grant Number: SE0001850, **State:** SC, **Program Year:** 2025
Recipient: South Carolina State of

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

V.1 Eligibility

V.1.1 Approach to Determining Client Eligibility

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

Definition of Income used to determine eligibility is consistent with DOE Weatherization Program Notice 25-3. Income means Cash Receipts earned and/or received by the applicant before taxes during applicable tax year(s), excluding the Income Exclusions listed below. Gross Income is to be used, not Net Income.

Cash Receipts

Cash Receipts includes the following: (1) money, wages, and salaries earned or received by the applicant before taxes/deductions during the applicable tax year(s); (2) net receipts from nonfarm or farm self-employment (receipts from a person's own business or from an owned or rented farm after deductions for business or farm expenses); (3) regular payments from Social Security, railroad retirement, unemployment compensation, strike benefits from union funds, worker's compensation, veteran's payments, training stipends, alimony, and military family allotments; (4) private pensions, government employee pensions (including military retirement pay), and regular insurance or annuity payments; (5) dividends and/or interest; (6) net rental income and net royalties; (7) periodic receipts from estates or trusts; and (8) net gambling or lottery winnings.

Income Exclusions

The following Cash Receipts are not considered Income: (1) capital gains; (2) any assets drawn down as withdrawals from a bank; (3) money from the sale of a property, house or car; (4) onetime payments from a welfare agency to a family or person who is in temporary financial difficulty; (5) tax refunds; (6) gifts, loans or lump sum inheritances; (7) college scholarships; (8) onetime insurance payments, or compensation for injury; (9) noncash benefits, such as the employer paid or union paid portion of health insurance; (10) employee fringe benefits, food or housing received in lieu of wages; (11) the value of food and fuel produced and consumed on farms; (12) the imputed value of rent from owner occupied nonfarm or farm housing; (13) depreciation for farm or business assets; (14) federal noncash benefit programs such as Medicare, Medicaid, food stamps, school lunches and housing assistance; (15) combat zone pay to the military; (16) child support (as further defined below); (17) reverse mortgages; (18) payment for care of foster children.

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

Child support payments from the applicant to another entity are not to be deducted for the purposes of determining applicant eligibility.

Describe what household eligibility basis will be used in the Program

Determining Eligibility

A household shall be determined eligible for Weatherization Assistance if:

1. the combined income for the family unit is at or below 200% of the federal poverty level (as updated in the annual federal poverty guidelines). OEO will follow WPN 22-5 and deem applicants eligible for means-tested HUD programs as income eligible for weatherization.
2. A household containing a member that received one of the following during the previous 12 months will also be deemed eligible for weatherization:
 - Cash assistance payments under Title IV (FIP)
 - Cash assistance payments under XVI of the Social Security Act (SSI)

No dwelling unit may be weatherized without documentation that household is income eligible and the dwelling unit is an eligible unit. South Carolina will follow LIHEAP Guidance on providing assistance to ineligible household members. Ineligible members (such as nonqualified aliens) will have their income counted in determining the household's total income. However, they will not count toward the household size. When the federal poverty levels are adjusted, OEO notifies the sub-grantees via memo (the 2025 memo is attached to this state plan). OEO also notifies LITT administrators to update the LITT systems with the latest levels.

U.S. Department of Energy
Weatherization Assistance Program (WAP)
STATE PLAN / MASTER FILE WORKSHEET
Grant Number: SE0001850, **State:** SC, **Program Year:** 2025
Recipient: South Carolina State of

Eligibility Documentation

Income eligibility is determined by sub-grantees using the statewide LITT systems. Sub-grantees enter income information and household composition and LITT determines eligibility. Proof of income eligibility and associated documentation must be included and clearly identified in the client file in LITT. If income eligibility is determined by an outside entity, verification of that determination must be included in the client file in LITT (e.g., Section 8 documentation if determined eligible by the US Department of Housing and Urban Development).

Household eligibility documentation is saved in LITT and available to OEO or DOE upon request. Updates to income, household composition, or other factors that impact eligibility are archived in LITT. All weatherization requirements and changes are updated in LITT to ensure weatherization assistance program compliance by all sub-grantees. The LITT system prevents weatherization services from commencing until the household is determined to be eligible. The LITT Eligibility Determination Date is used to determine when a client becomes eligible for weatherization. This safeguard ensures that all households receiving weatherization services are eligible. No dwelling unit may be weatherized without documentation that the household is income eligible and the dwelling unit is an eligible unit.

Income eligibility is determined by sub-grantees using the statewide LITT/DBA system. Sub-grantees are required to maintain a signed weatherization program application. All other documentation of client eligibility is uploaded to LITT. If weatherization services do not begin (an energy audit has not been initiated) within 12 months of the eligibility date, the household's eligibility must be re-determined.

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

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

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

South Carolina will follow the policies outlined in "Summary of Immigrant Eligibility Restrictions under Current Law as of 2/25/2009" and "HHS Guidance on the Use of Social Security Numbers (SSNs) and Citizenship Status Verification" to determine eligibility of qualified and nonqualified aliens.

The policy can be found at:

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

V.1.2 Approach to Determining Building Eligibility

Procedures to determine that units weatherized have eligibility documentation

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

10 CFR 440.3 defines a dwelling unit as a house, including stationary mobile home, an apartment, a group of rooms, or a single room occupied as a separate living quarters. 10 CFR Part 440.16(a): No dwelling unit may be weatherized without documentation that the unit is an eligible unit as provided in 440.22.

Sub-grantees are required to retain records of all dwellings that received Federal funds including LIHEAP, HUD, or USDA as part of "weatherization" activities. Dwellings may be re-weatherized after 15 years have passed since the completion of the original weatherization services.

Sub-grantees are required to complete, prior to any weatherization activity, a State Historic Preservation (SHPO) review for units 50 years of age or older at the time the work takes place, units that are historic properties, units that are in a designated historic area, or units where the age cannot be determined. South Carolina's SHPO Programmatic Agreement (PA) was amended to be valid until December 31, 2030.

SC OEO's review of Sub grantee household files includes verification of SHPO review and re-weatherization status.

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Eligible Dwelling Units

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

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

Describe Reweathering compliance

No dwelling unit will be weatherized without documentation that the dwelling unit is an eligible unit, as defined in 10 CFR 440.22. Sub-grantees verify applicant's income during the application process and maintain records that include documentation of client's eligibility. Sub-grantees maintain records of previously weatherized dwelling units and previously weatherized dwellings are also included in LITT. The databases are checked prior to scheduling a household for service to ensure that the house has not been previously weatherized. If the house has been previously weatherized and is not eligible for re-weatherization, the house will not be weatherized and the client will be notified. If the house is eligible for re-weatherization, the sub-grantee makes a determination whether or not to re-weatherize the house based on the client's standing on the waiting list (see section V.3 for prioritization). Dwellings may be re-weatherized 15 years after the previous completed weatherization date. Sub-grantees maintain their own records of dwellings that may have received LIHEAP, HUD, or USDA weatherization funding and look for evidence of previous weatherization when onsite.

Describe what structures are eligible for weatherization

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

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

If energy savings cannot be realized due to the condition of a home, these conditions shall be documented in LITT and the home shall not be weatherized, provided the home could not be made ready for weatherization by using Weatherization Readiness Funds (WRF). Such energy audit conditions shall be brought to the attention of the client. The client will be referred to other organizations that may be able to assist them.

Describe how Rental Units/Multifamily Buildings will be addressed

Rental Units/Multifamily Buildings

Single family rental dwellings and buildings with up to four units are addressed using the WA10 software in LITT.

Multifamily housing containing five or more units will be addressed by the sub-grantee submitting a proposal to DOE through OEO providing the project details. No weatherization work on multifamily housing containing five or more units will begin until approval is received from DOE. OEO will utilize the WAP Multifamily Case by Case Project Submittal Checklist (included as an attachment). Sub-grantees are required to enter into an

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agreement with landlords of multifamily properties. The agreement must state that rent on properties weatherized with DOE funds cannot be raised as a result of the increase in property value provided by weatherization services for 1 year. South Carolina uses the 66% percent eligible rule (50% for duplexes and four units) to determine multifamily eligibility for buildings not already verified as eligible by HUD and USDA.

Landlord Contributions

Sub-grantees may choose to require landlord contributions when weatherizing rental properties containing two to four units. The amount of financial participation is determined at the local level. Landlord participation can be used to buy down the SIR of a multifamily weatherization project in compliance with WPN 16-5 and WAP Memorandum 035. Landlord contributions for single family dwellings are not required but are optional and may be accepted.

Homeowner, Fuel Release Form 101

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

The Homeowner, Fuel Release Form 101 includes:

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

Shelters

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

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

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

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

Describe the deferral Process

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Deferrals may take place during any phase of the weatherization process, including but not limited to: Intake/eligibility, pre-weatherization inspection/walkthrough, Energy Audit, or in-process weatherization activity. Postponement of work is advisable until problems can be resolved and/or alternative sources of assistance are identified.

Subgrantees track deferrals using the LITT database. Documentation regarding the reason for deferral is required in the client file and sub-grantees must communicate the specific reason for deferral to the client using Form 107 Deferral of Service Notification. Subgrantees are encouraged to collaborate with their state technical monitor to make decisions regarding deferral.

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

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

Listed below are examples of deferral issues (including underlying issues that the specific repair could correct) that could potentially be fixed with additional funding.

1. Roof, ceiling, wall (interior and/or exterior), floor, or foundation/subspace repair needed to address: mold/moisture, sewage, pest infestation, or damage that prohibits effective weatherization.
2. Plumbing repair needed to address: mold/moisture, sewage, pest infestation, or other issues.
3. Electrical repair needed to address: issues that prohibit effective weatherization (e.g. cannot insulate walls due to knob & tube wiring), safety hazards or other issues.
4. Cleanup or remediation required beyond the scope of weatherization to address: mold/moisture, sewage, suspected asbestos containing materials (attic, walls, etc.), lead paint, pest infestation, clutter restricting access to necessary areas or other issues.
5. Exterior draining repairs (e.g. landscaping or gutters) needed to address: mold/moisture, sewage or other issues.

When possible, sub-grantees are encouraged to use Weatherization Readiness Funds (or other alternative funds), make referrals, or collaborate with other programs. However, if Weatherization Readiness Funds are not available, it is the client's responsibility to correct the condition(s) causing the deferral in order for weatherization services to proceed. When the conditions causing the deferral have been addressed, clients are asked to contact the sub-grantee to reevaluate the home. These clients are then given top priority to receive services and are not placed back on the wait list.

Weatherization Readiness Fund Plan

To address deferral issues in Program Year 2025, OEO will use the Weatherization Readiness Fund (WRF) Plan as described below.

South Carolina will receive \$298,739 in WRF for Program Year 2025. OEO met with each subgrantee in December 2024 and determined a quota of WRF completions. The quotas and allocations are outlined below.

| Subgrantee | WRF Allocation | WRF Quota |
|---|----------------|-----------|
| Aiken-Barnwell Counties Community Action Agency | \$71,128 | 10 |

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| | | |
|---|----------|----|
| Carolina Community Action, Inc. | \$14,226 | 2 |
| Charleston County Human Services Commission dba Palmetto CAP | \$71,128 | 10 |
| Chesterfield-Marlboro Economic Opportunity Council, Inc. | \$35,564 | 5 |
| GLEAMNS Human Resources Commission, Inc. | \$42,677 | 6 |
| Lowcountry Community Action Agency, Inc. | \$21,339 | 3 |
| Waccamaw Economic Opportunity Council, Inc. | \$28,451 | 4 |
| Wateree Community Actions, Inc. | \$14,226 | 2 |

WRF Maximum

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

WRF Prioritization of Dwellings

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

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

And

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

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

WRF Process

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

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

Restrictions on WRF Money

Any dwelling that receives WRF money must result in a DOE completion (either for the annual formula grant or BIL). This means at least one Energy Conservation Measure (ECM) using DOE funds must be installed in the dwelling. OEO understands there may be rare instances where a dwelling receiving WRF money does not result in DOE completion (client moves or becomes non-responsive, client passes away, natural disaster occurs, etc.). OEO will consult with DOE and the sub-grantee regarding next steps should these situations arise.

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

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Health and Safety) are installed.

Repairs Eligible for WRF Money

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

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

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

WRF Tracking

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

OEO understands WRF measures can take time to install and may extend over multiple program years if the WRF project begins near the end of one program year. For WRF projects that begin in the final quarter (January, February, or March) of the current Program Year, sub-grantees will consult with OEO and determine if they can be completed before the current Program Year ends. If a project will extend into the following Program Year, it must be completed before the end of the first quarter of the new Program Year.

WRF Monitoring

OEO will collect and report the following information in its annual monitoring of sub-grantees.

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

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

V.1.3 Definition of Children

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

V.1.4 Approach to Tribal Organizations

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

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

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

V.2 Selection of Areas to Be Served

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Weatherization Assistance is provided to all forty-six (46) counties in South Carolina by 8 community action agencies (sub-grantees). The Weatherization Assistance Program is to be administered locally by community action agencies, per S.C. Code §4852440. CAAs are the statutorily mandated WAP sub-grantees in South Carolina. South Carolina Code of Laws SECTION 583750 (m)(1)(b) states "the Weatherization Assistance Program, created by Title IV of the Energy Conservation and Production Act of 1976 and codified as Part A, Subchapter III, Chapter 81, Title 42 of the United States Code, amended by the National Energy Conservation Policy Act, the Energy Security Act, the Human Services Reauthorization Act of 1984, and the State Energy Efficiency Programs Improvement Act of 1990 and administered and funded by the United States Department of Energy on the federal level and administered locally by community action agencies." The local community action agency is responsible for administration and implementation of the program. Preference is given to any community action agency which has, or is currently administering, an effective program under 10 CFR 440 or under Title II of the Economic Opportunity Act of 1964. Funds are allocated based upon the most recent Census poverty population data in the counties the sub-grantees serves.

The eight sub-grantees chosen to perform weatherization work in South Carolina are:

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

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

2. Carolina Community Actions, Inc.

Counties - Chester, Fairfield, Lancaster, Union, York

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

Counties - Beaufort, Berkeley, Charleston, Dorchester, Jasper

4. Chesterfield-Marlboro Economic Opportunity Council, Inc.

Counties - Chesterfield, Darlington, Dillon, Marlboro

5. GLEAMNS Human Resources Commission, Inc.

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

6. Lowcountry Community Action Agency

Counties - Colleton, Hampton

7. Waccamaw Economic Opportunity Council, Inc.

Counties - Georgetown, Horry, Williamsburg

8. Wateree Community Actions, Inc.

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

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

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

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

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V.3 Priorities

South Carolina prioritizes WAP clients based on five categories. In LITT, 20 points are assigned for each priority classification a household possesses. LITT calculates the total points. Households with the highest points are selected by sub-grantees for weatherization. Points are awarded based on the following classifications.

- 20 points - Households containing at least one member who is 60 years of age or older.
- 20 points - Households containing at least one member who is disabled (as determined by Social Security, Veteran's Affairs, Vocational Rehabilitation, or another governmental agency).
- 20 points - Households containing at least one child under 18 years of age.
- 20 points - Households with a High Energy Burden. This is defined by South Carolina as a household that spends at least 20 percent of their household income on energy usage.
- 20 points - Households that are considered High Energy Users. This is defined by South Carolina as a LIHEAP eligible household (income less than or equal to 150% of the Federal Poverty Level).

Households will receive 0, 20, 40, 60, 80, or 100 points based on their composition and characteristics. Households will not be awarded multiple points in any category. For example, a household will receive 20 points for the disabled category if they have one or multiple disabled members. Households with the same number of points will be prioritized based on their time on the waitlist. No other categories or household characteristics serve to prioritize weatherization clients in South Carolina.

Time Period for Income Verification

Applications must be recertified after a 12-month period.

V.4 Climatic Conditions

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

Our demand for electricity is rather sensitive to the weather. Changes in the weather patterns mean changes in energy consumption.

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

Note: SC annual heating and cooling degree days based on January 1, 2024 through December 1, 2024.

Base temperature = 65°F.

Greenville, SC - Greenville Downtown (KGMU)

Heating Degree Days – 1,971

Cooling Degree Days – 2,051

Columbia, SC - Metropolitan Airport (KCAE)

Heating Degree Days – 1,733

Cooling Degree Days – 2,497

Charleston, SC - Charleston International Airport (KCHS)

Heating Degree Days – 1,215

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Cooling Degree Days – 2,710

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

V.5 Type of Weatherization Work to Be Done

V.5.1 Technical Guides and Materials

Technical Guides and Materials

1. Standard Work Specification (SWS). South Carolina will follow the SWS when weatherizing client homes.
2. South Carolina Weatherization Field Guide (SC Field Guide) for Site-Built and Manufactured Housing was approved by the Department of Energy on September 14, 2021. All tasks performed on client homes will meet the specifications, objectives and desired outcomes outlined in the SC Field Guide. The SC Field Guide was posted to the OEO's website and sub-grantees were notified via email regarding its approval and how to access. Sub-grantees signed a form acknowledging receipt of the SC Field Guide (included as an attachment to the State Plan)
3. DOE and NREL guidance. All weatherization work will be performed in accordance with U.S. Department of Energy approved procedures and materials listed in 10 CFR 440 Appendix A. Sub-grantees must perform all work according to the National Renewable Energy Laboratory
4. SC Weatherization Policies and Procedures Manual (SC WAP Manual). The SC WAP Manual contains guidance on how to implement administrative and field requirements. Field guidance focuses on installation techniques, proper methods of testing, health and safety requirements, and data collection and submission. Administrative guidance focuses on training plans and schedules, data collection and submission, and contract language and wording to communicate requirements and specifications
5. Sub-contractor agreements. OEO contracts with sub-grantees specify all sub-contractor agreements must contain the following language.

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

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

Incidental Repair Measures (IRMs)

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

Energy Audit Procedures

Single Family Buildings

- National Energy Audit (NEAT) conditionally approved on June 21, 2024.
- NEAT will be used to determine the cost effectiveness of all single family, site built family homes.
- South Carolina is in the process of making requested updates to the Energy Audit process based on recommendations from DOE and will be submitting those in January 2025.

Manufactured Housing

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- Manufactured Home Energy Audit (MHEA) conditionally approved on June 21, 2024.
- MHEA will be used to determine the cost effectiveness of all manufactured housing.
- South Carolina is in the process of making requested updates to the Energy Audit process based on recommendations from DOE and will be submitting those in January 2025.

Multifamily

- No approved audit.
- Multifamily Eligibility
 - Per 10 CFR 440.22(b), multifamily buildings may be weatherized when 66 percent (50 percent if a two or four unit building) of the dwelling units in the building are eligible households or will become eligible within 180 days due to a federal, state, or local government program for rehabilitation of the building or making similar improvements. Determination of eligibility shall use the financial assistance guidelines to determine eligibility.
 - If the entire building is not eligible for weatherization because there are not enough units to meet the 66% (or 50%) eligibility criteria, weatherization service to the entire building shall be denied.
 - Sub-grantees shall weatherize the entire multifamily building when the building is eligible.
 - Sub-grantees shall obtain a signed authorization form from the property owner/landlord or their designated agent authorizing the work to be done and agreeing to the property owner/landlord's financial participation.
 - Sub-grantees must use the Weatherization Application Form and the Homeowner Fuel Release Form 101 for each rental weatherization project.
 - Sub-grantee shall develop a detailed description/work order of the measures to be completed and the costs assigned to the property owner/landlord and the sub-grantee/program.
 - The agreement shall include language whereas the property owner/landlord agrees not to raise the rent for at least one year from the time the work is completed, unless the increase is based on factors unrelated to the weatherization improvements.
 - The client shall be provided a copy of the signed agreement.
 - No undue or excessive enhancements shall accrue to the value of the weatherized dwelling units.
 - The maximum amount of grant funds that can be spent for weatherization is determined by the number of eligible units in the building, multiplied by the average cost per unit. This is the maximum amount that can be spent on the entire building.

Five or More Unit Multifamily Buildings

Sub-grantees must provide a preliminary assessment of the multifamily buildings with 5 units or more and submit the request to OEO. Sub-grantees will use the Multi-family Case by Case Project Submittal Checklist when developing the request. OEO will then review/submit the plans and request permission from the DOE Project Officer to proceed.

The preliminary assessment is to include the following:

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

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Property Documents to be covered during preliminary process

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

Field guide types approval dates

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

V.5.2 Energy Audit Procedures

Audit Procedures and Dates Most Recently Approved by DOE

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

Audit Procedure: Manufactured Housing
Audit Name: MHEA
Approval Date:

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

Comments

South Carolina requires all single family and manufactured homes have an audit conducted in LITT (API that calls WA 10) to determine cost effective measures to be installed. In accordance with WPN 23-6, South Carolina submitted a proposed Energy Audit to DOE for approval in April 2024. The Energy Audit was approved in July 2024. This approval is good for five years. South Carolina will submit for approval again in 2029.

Only measures that are cost effective showing, a SIR of 1.0 or greater may be installed with DOE funds. Measures with an SIR of 1.0 or greater are determined to be cost effective, meaning the lifetime savings produced by the measure is greater than the total cost of installation. Measures with an SIR of 0.5 or greater may be installed with LIHEAP or other braided funds assuming the entire SIR of the project is 1.0 or greater.

SINGLE FAMILY HOMES and MULTIFAMILY (2 - 4 units per building)

South Carolina's basic housing types for single family homes are as follows:

- Type A – Wood-framed with vented crawlspace and unfinished attic
- Type B – Wood-framed with non-conditioned basement and unfinished attic
- Type C – Wood-framed with uninsulated slab and unfinished attic
- Type D – Wood-framed with vented crawlspace and kneewall attic
- Type E – Wood-framed with non-conditioned basement and kneewall attic
- Type F – Wood-framed with uninsulated slab and kneewall attic
- Type G – Masonry with vented crawlspace and unfinished attic
- Type H – Masonry with uninsulated slab and unfinished attic

The Weatherization Assistant National Energy Audit Tool (NEAT) from Weatherization Assistant 10 will be used to determine cost effective

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measures for all single family homes.

Manufactured Homes

South Carolina's basic housing types for manufactured homes are as follows:

- Type A - Pitched Roof with non-vented walls and length wise floor joists
- Type B - Pitched Roof with non-vented walls and width wise floor joists
- Type C - Pitched Roof with vented walls and length wise floor joists
- Type D - Pitched Roof with vented walls and width wise floor joists
- Type E - Bowstring Roof with non-vented walls and length wise floor joists
- Type F - Bowstring Roof with non-vented walls and width wise floor joists
- Type G - Bowstring Roof with vented walls and length wise floor joists
- Type H - Bowstring Roof with vented walls and width wise floor joists
- Type I - Flat Roof with non-vented walls and length wise floor joists
- Type J - Flat Roof with non-vented walls and width wise floor joists
- Type K - Flat Roof with vented walls and length wise floor joists
- Type L - Flat Roof with vented walls and width wise floor joists

The Weatherization Assistant Manufactured Housing Energy Audit (MHEA) from Weatherization Assistant 10 will be used to determine cost effective measures for manufactured housing.

MULTIFAMILY (5+ units per building)

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

Regional Priority List

South Carolina submitted their proposed Regional Priority List (RPL) with their proposed Energy Audit . The RPL was approved and includes preapproved weatherization measures that can be installed in eligible dwelling units without an Energy Audit being conducted. The RPL is optional and sub-grantees can continue to use the existing Energy Audit procedures to weatherize dwellings that meet the criteria to use the RPL. The memo, the specific RPL Policies and Procedures, and new and updated forms are attached to the South Carolina 2024 Weatherization Assistance Program State Plan. The RPL will continue to be available for use by sub-grantees when South Carolina transitions to LITT on April 1, 2024.

V.5.3 Final Inspection

Sub-grantees are required to perform an independent quality control inspection after weatherization work is completed on each dwelling. This inspection must occur, and be documented, before reporting the project to the State as a "completed unit". This process is to ensure that all work performed meets or exceeds the minimum specifications outlined in the SWS in accordance with 10 CFR 440.16(g) as well as any local building codes or requirements. All supporting documentation including inspection forms, work orders, and Recommended Measure Reports (RMR), will be maintained in the client's file.

The inspection must be performed by a certified Quality Control Inspector (QCI). The QCI evaluates the work performed against the RMR and Work Order, records/reports findings and concerns, and specifies corrective actions. This is done by conducting a methodological audit/inspection of the building, performing safety and diagnostic tests, and by observing the retrofit work in order to ensure the completion, appropriateness and quality of the work providing for the safety comfort and energy savings of the building occupants. The QCI will also interview the building occupants to alleviate any concerns they have regarding the weatherization process and ensure the crews or contractors performing the work were courteous and respectful.

The QCI will also ensure all installed measures align with the SWS and the South Carolina Weatherization Field Guide. The QCI will review the original Energy Audit including data inputs, test (blower door, CAZ, etc.) results, and photographs (before, in-progress, and after). The QCI will review the Work Order to ensure adequate guidance was provided to the crew or contractor that installed the measures and evaluate any change orders to ensure all measures are justified either by the SIR or Health and Safety requirements.

While this may not always be possible with schedules and the size of some sub-grantees, OEO encourages the QCI to schedule in-progress visits when possible. During these in-progress visits, the QCI can connect with the crew or contractor, observe any potential complexities, discuss any issues with the work, and participate in the weatherization process.

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The quality control inspection will include a completed and signed Data Collection/Final Inspection Form 501. This form should include data from each test the QCI runs after the weatherization work is performed (blower door, pressure pans, ASHRAE fan settings, etc.). Any outstanding Health and Safety issues or required reworks will be noted on this form and relayed to the crew or contractor. Once the dwelling receives a satisfactory inspection from the QCI, a signed copy of the QCI Final Inspection Certification Form 600 will be added to the client file. All invoices related to the weatherization work will also be included in the client file. The QCI should review this information to ensure no measures were billed incorrectly, work is accounted for, and all fiscal requirements (SIR, DOE limits on Incidental Repairs and Health and Safety measures, etc.) are met.

All of the sub-grantees have at least one QCI on staff. Below is the list of sub-grantees and the total QCIs on staff.

| Subgrantee | QCI (s) on Staff |
|--|---------------------|
| Aiken/Barnwell Counties Community Action Agency, Inc. | 7 |
| Carolina Community Actions, Inc. | 1 |
| Chesterfield-Marlboro Economic Opportunity Council, Inc. | 1 |
| GLEAMNS Human Resources Commission, Inc. | 2 |
| Lowcountry Community Action Agency, Inc. | 1 |
| Charleston County Human Services dba Palmetto Community Action Partnership | 2 |
| Waccamaw Economic Opportunity Council, Inc. | 3 |
| Wateree Community Actions, Inc. | 1 |

Seven of the eight sub-grantees utilize contractors to install weatherization measures. Palmetto utilizes a hybrid model. Crews and contractors both install weatherization measures. However, the quality control inspectors are not part of the crew and do not directly install weatherization measures. Therefore, all weatherization measures installed in South Carolina receive a Quality Control Inspection from an independent source that did not directly install the weatherization measures.

SC OEO's QCI certified inspectors will monitor (at least) 10 percent of the completed units and accompanying client files for each sub-grantee until the sub-grantee has an independent assessor and QCI in place. Sub-grantees are required to ensure that each Weatherization completion receives an appropriate and properly executed final inspection. This inspection must be performed by a certified Quality Control Inspector (QCI). As part of their regular monitoring procedure, OEO will review final inspection forms, sub-grantee inspection processes, and completed homes to ensure the inspections are being performed correctly and in a manner that is consistent with DOE expectations as outlined in WPN-22-4.

For sub-grantees that do not have an independent Energy Auditor and Quality Control Inspector, OEO encourages them to contract the Energy Audit or Quality Control Inspection for a percentage of their jobs out to another certified individual within the network.

When OEO's QCI identifies SWS discrepancies, corrections must be performed using nonfederal funds. Should monitoring reveal repeat SWS discrepancies or poorly performed inspections, OEO will place the sub-grantee on a corrective action plan. Should the corrective action plan fail to correct the issue, OEO will seek stiffer actions as allowed in the Weatherization Sub-grantee Grant Agreement. Failure by the sub-grantee to utilize the QCI process correctly may result in all associated costs being disallowed and funds returned to OEO.

V.6 Weatherization Analysis of Effectiveness

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

Program production, goal attainment, and expenditure costs will be tracked on a monthly basis for each sub-grantee at the State level using LITT/DBA. OEO will utilize LITT/DBA to track weatherization work performed on dwellings.

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

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

OEO conducts production quota meetings with sub-grantees monthly. Sub-grantees not meeting quarterly production goals are contacted by state staff and required to provide a production plan to support meeting prescribed quarterly goals and ensuring completion of the contractually required number of DOE houses by the end of the program period. This plan will include any additional training or technical assistance needs that may hinder the sub-grantee in meeting production goals. Sub-grantees that fail to achieve the production quota agreed to by the community action agency and OEO may have DOE administrative funding reduced in the following program year. This reduction will at no time reduce the allocation for administration below the DOE mandated 7.5%. Additionally, if agencies fail to achieve the production quota for a period of two consecutive years, OEO reserves the right to rebid the selected service area.

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

Other Considerations

OEO and its sub-grantees do not discriminate against employees, contractors or applicants based on race, nationality, religion, gender identity, sexual orientation, age, or disability,

Sub-grantee funding allocation is based on the most recent census date which includes poverty levels for each county. This allocation ensures that areas with higher concentrations of poverty receive more DOE funding.

Sub-grantee Default, Suspension, Transfer / Termination

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

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

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

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

V.7 Health and Safety

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

The maximum amount of DOE Health and Safety money that can be spent on a dwelling is \$1,500.

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

V.8 Program Management

V.8.1 Overview and Organization

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

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

The OEO staff responsible for the oversight of the Weatherization Assistance Program in South Carolina are James Miller, OEO Director; Kimberly Cosare, Executive Fiscal Administrator; Patricia Morrison, Attorney; Matthew Melton, Weatherization Assistance Program Manager; Savannah Brock, Weatherization Assistance Program Coordinator; Matthew Dennis, Weatherization Assistance Program Coordinator; and Eric Anderson, Weatherization Assistance Program Quality Control Inspector.

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

V.8.2 Administrative Expenditure Limits

The grantee (OEO) can take up to 7.5% of the total DOE 2025 allocation for administration. Sub-grantees who are allocated more than \$350,000 in 2025 DOE funds are allowed to spend up to 7.5% of their total allocation on administrative expenses. Sub-grantees who are allocated less than \$350,000 in 2025 DOE funds are allowed to spend up to 12.5% of their total allocation on administrative expenses.

V.8.3 Monitoring Activities

See attached Monitoring Plan.

V.8.4 Training and Technical Assistance Approach and Activities

See attached Training and Technical Assistance Plan.

Percent of overall trainings

Comprehensive Trainings: 75.0

Specific Trainings: 25.0

Breakdown of T&TA training budget

Percent of budget allocated to Auditor/QCI trainings: 50.0

Percent of budget allocated to Crew/Installer trainings: 25.0

Percent of budget allocated to Management/Financial trainings: 25.0

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V.9 Energy Crisis and Disaster Plan

Purpose

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

Policy

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

Allowable expenditures under WAP include:

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

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

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

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

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

- The total allowance for disaster related hazards is limited to the Average Cost Per Unit (ACPU) for PY 2024 = \$8,497.
- The total allowance for incidental repairs in support of installation of weatherization materials is limited to the DOE Incidental Repair maximum previously defined in Section V.5.1 = \$500.
- The total allowance for health and safety costs is limited to the DOE maximum as defined in the Health and Safety Plan = \$1,500.
- To the extent that the services are in support of eligible weatherization (or permissible re-weatherization) work, such expenditure would be allowable.

Reprioritization of Weatherization requests coming from the disaster area

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