



2026 WINTER TRAINING CONFERENCE

“Rooted in Hope”



Leveraging and
Collaboration Models
in WAP

www.nascsp.org

Presenters:



Laura Whitfield

Georgia Environmental Finance Authority,
Weatherization Program Manager



Chris Willman

Weatherization Training Team Leader, Indiana
Community Action Association



Allen Carbert

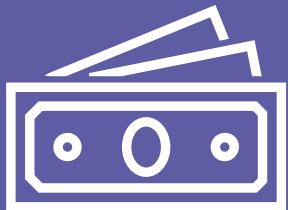
Managing Director, Weatherization Unit,
Washington State Department of Commerce

Leveraged Funding in WAP



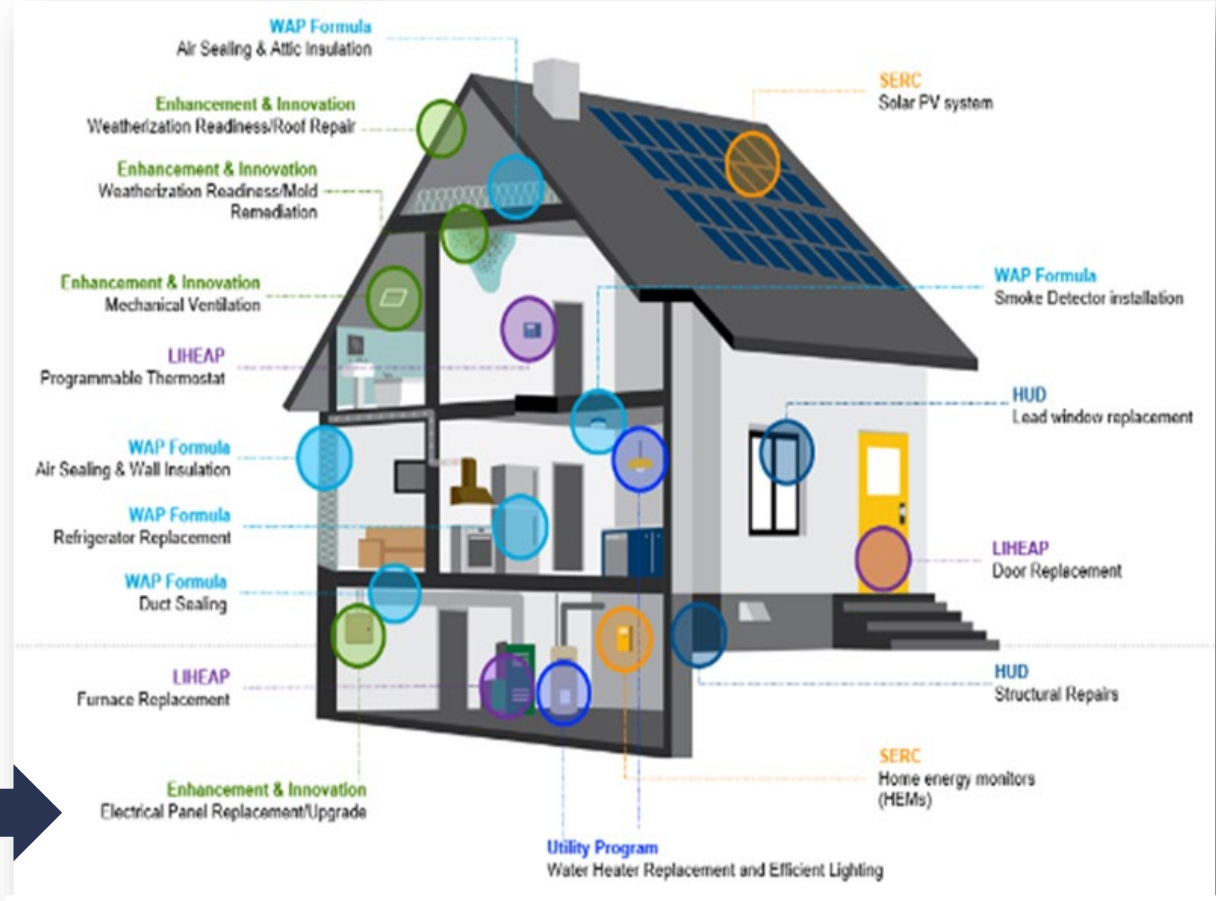
LEVERAGING ACTIVITIES:

Activities that support securing and administering non-DOE funding for weatherization



LEVERAGED FUNDING:

Federal and non-federal funding secured to supplement DOE WAP



BRAIDING FUNDS:

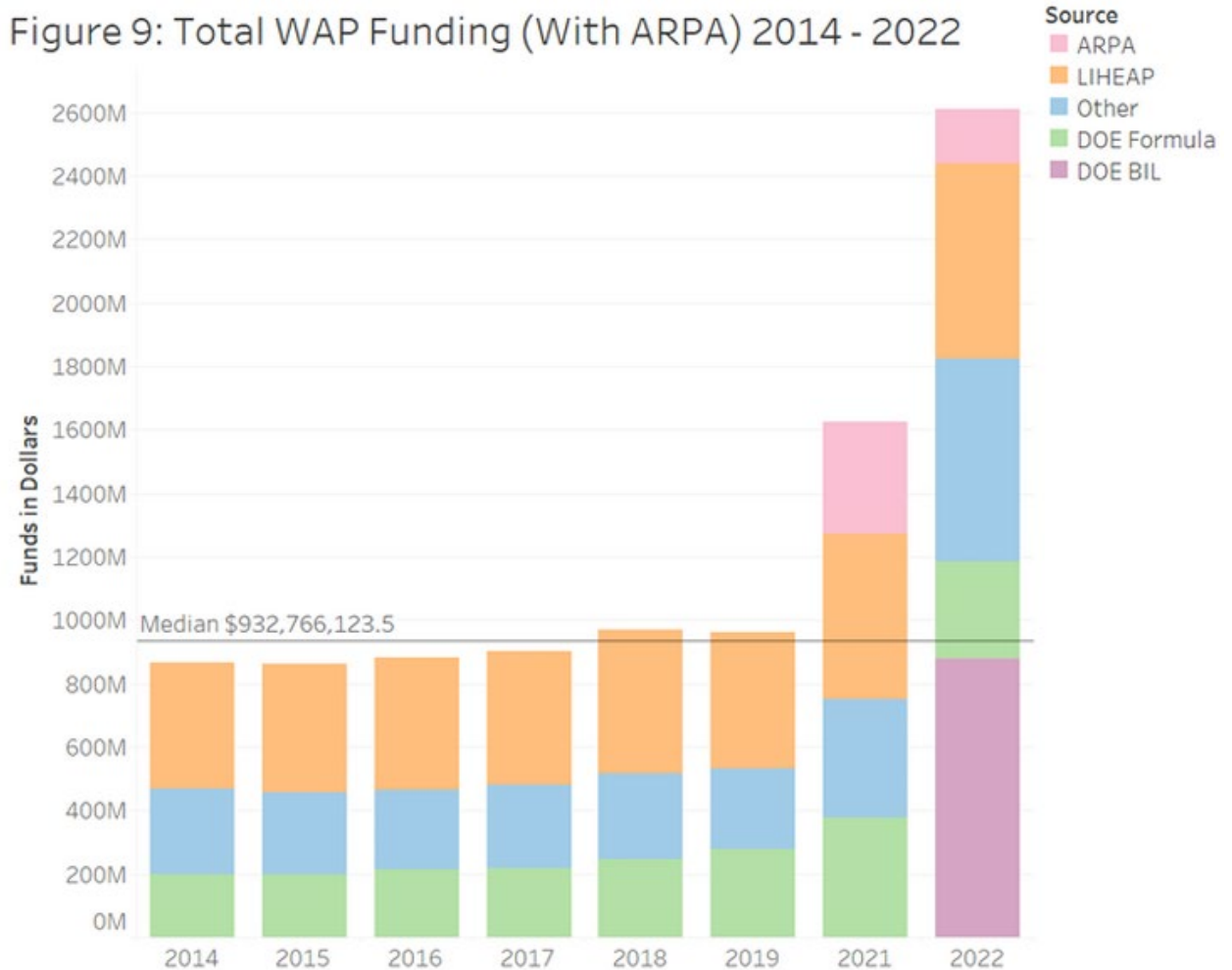
Utilizing two or more funding sources on a job. Each funding source can be isolated from all others in financial/accounting and reporting systems.

WAP Funding by Sources

Weatherization is funded by a number of sources, including:

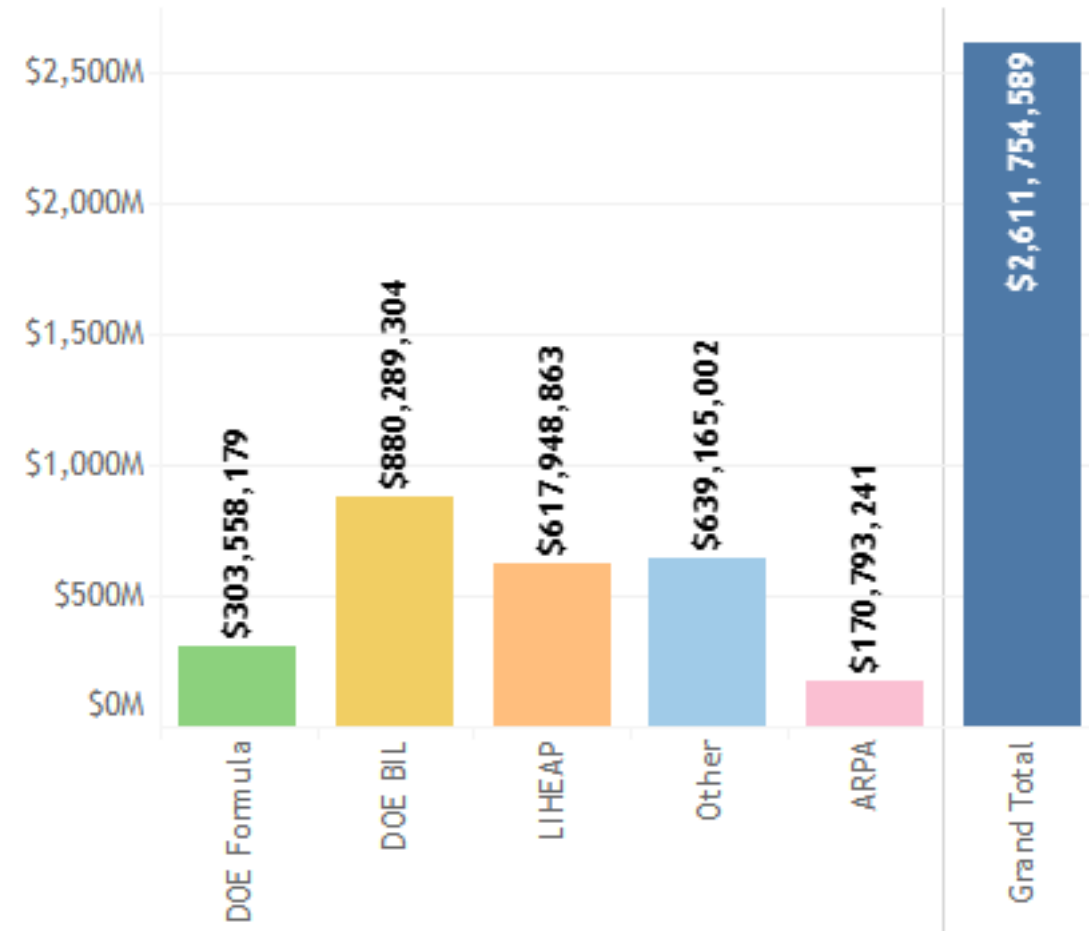
- DOE Formula
- DOE BIL
- LIHEAP
- ARPA
- **Other (HUD, USDA, EPA, State, Utility, Misc., etc.)**

Figure 9: Total WAP Funding (With ARPA) 2014 - 2022



NASCSP PY 2022 Annual Funding Report

- OTHER Funding \$639M / 24% of WAP funding
 - Grantees reported \$344M in OTHER funding
 - Subgrantees reported \$294M in OTHER funding directly to them
- OTHER Funding is comprised mainly of utility and state funds.



Leveraged Funds

Included in the DOE Budget : By including leveraged funds amount in the budget, those funds are calculated into **administration percentages and T&TA** allocations, giving the Grantee and Subgrantees additional funds to administer the leveraged resources and train staff.

Leveraged Funds Not Included in Budget: The leveraged funds do not have to follow all DOE rules. Instead, these funds can be used in parallel to the DOE Program. This is the most common approach used by Grantees.

*A percentage of the WAP grant can be used to **attract leveraged funds** even though the leveraged funds are **not** included in the DOE Program budget.*

The optional budget categories are:

- Vehicles and Equipment
- Liability Insurance
- **Leveraging**
- Health & Safety
- Financial Audit
- Energy Crisis
- Disaster Crisis
- Special Projects I-V

Grantees can add
“Leveraging” to the
IIJA and/or WAP
Formula budgets.

Leveraging Activities – OPTIONAL Budget Category

WPN 25-1 / WPN IJA -1

Up to 15% of the DOE allocation can be used for leveraging activities (10 CFR 440.14(c)(6)(xiv)) including:

- Holding meetings
- Facilitating matching funds
- Negotiating contracts, MOUs, etc.
- Developing program design
- Providing technical assistance

Grantees are encouraged to generate at least one non-Federal leveraging dollar for every DOE dollar expended.

Grantee Leveraging Activities

Funds retained at state/territory for oversight and administration of activities.

Subgrantee Coordination

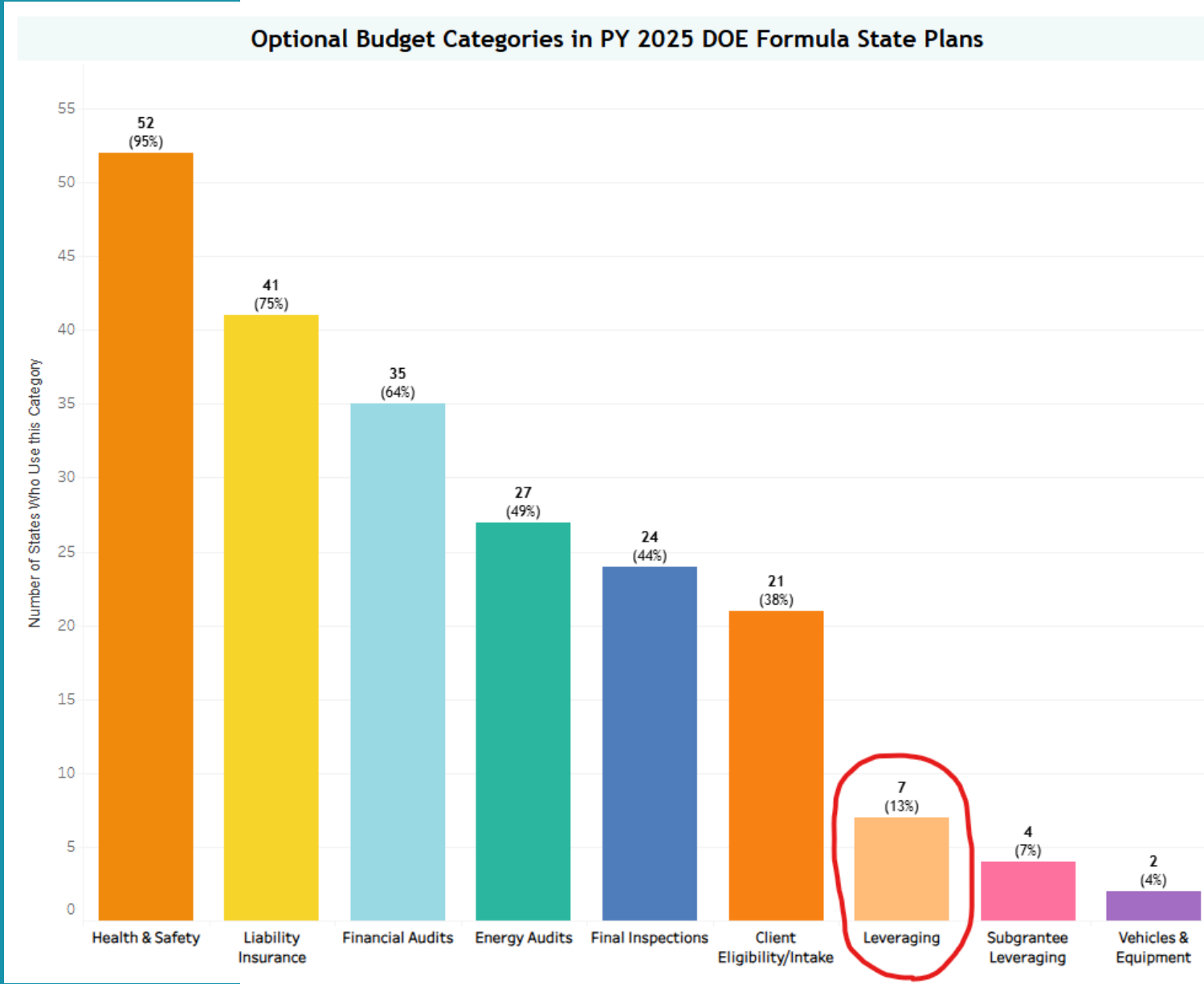
Funds provided to a Subgrantee or other organization that serves as an administrative agent and coordinates leveraging activities on behalf of all Subgrantees.

Subgrantee Allocations

Funding provided to each Subgrantee to support administrative costs for leveraging activities.

NASCSP State Plan Analysis

Only 7 Grantees are using the Leveraged Funding Category



Wisconsin State Plan

SECTION B - BUDGET CATEGORIES					
6. Object Class Categories	Grant Program, Function or Activity				Total (5)
	(1) HEALTH AND SAFETY	(2) LIABILITY INSURANCE	(3) LEVERAGING	(4) FINANCIAL AUDITS	
a. Personnel	\$ 0.00	\$ 0.00	\$ 198,652.00	\$ 0.00	\$ 1,143,238.00
b. Fringe Benefits	\$ 0.00	\$ 0.00	\$ 77,732.00	\$ 0.00	\$ 447,348.00
c. Travel	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 45,100.00
d. Equipment	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
e. Supplies	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 7,536.00
f. Contract	\$ 350,000.00	\$ 40,000.00	\$ 0.00	\$ 25,000.00	\$ 10,417,879.00
g. Construction	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
h. Other Direct Costs	\$ 0.00	\$ 0.00	\$ 20,861.00	\$ 0.00	\$ 144,240.00
i. Total Direct Charges	\$ 350,000.00	\$ 40,000.00	\$ 297,245.00	\$ 25,000.00	\$ 12,205,341.00
j. Indirect Costs	\$ 0.00	\$ 0.00	\$ 2,755.00	\$ 0.00	\$ 15,854.00
k. Totals	\$ 350,000.00	\$ 40,000.00	\$ 300,000.00	\$ 25,000.00	\$ 12,221,195.00
7. Program Income	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

Washington State Plan

Budget Justification

EE0009938

Leveraging

\$55,301.00

Budget negotiated between local agencies and Commerce for The Energy Project. The Energy Project works with current and potential allies to advocate for energy program funding and program design that is consistent with the DOE's WAP. In addition to protecting existing leveraged funds for energy efficiency work and expanding that funding, The Energy Project staff will continue to seek companion funding to support the repair and/or health and safety work that is critical to installing energy measures in low-income homes.

Making the most of utility funds



Washington State
Department of
Commerce

Weatherization in Washington State

- 26 subgrantees
- 39 counties
- 18 staff



Power in partnership

- Approximately \$110 million in federal/state funding & ~\$44 million in utility funding for 2023-2025
 - More funds
 - More flexibility
 - More units
 - More dollars spent

Utility landscape in Washington state

- **55+ utilities**
 - Investor-owned utilities (3)
 - Regulated by the Utilities Transportation Commission)
 - Clean Energy Transportation Act (requires low-income energy assistance programs)
 - Consumer-owned utilities (59)
 - Public utility districts, municipalities, co-ops

Utility funding

- **Utility funds previously flowed through Commerce**
 - Matchmaker program (1:1 utility : state)
- **Since 2016, utility funds go through agencies**
 - **In 2023-2025, the top 3 utility funders made up 81% of funds**
 - Since 2023, ~five rural agencies have received state dollars in lieu of utility dollars
 - Exception: Bonneville Power Administration (BPA) contracts go both from state to agency and BPA utility to agency
- **Utility funds have more than doubled in recent years**

Commerce x utilities ways of working

- **Data collection**
 - Projections (from utilities/agencies)
 - Actuals (from agencies)
- **Relationship building**
 - Focused on four largest funders
 - Bi-monthly/monthly meetings
 - Quarterly advisory group meetings
 - Internal Energy Division utility steering committee

The Energy Project

- [DOE WPN 22-9](#): Using activities to support securing and administering non-DOE funding for weatherization
- **The Energy Project**
 - Currently operated by WSCAP (Washington State Community Action Partnership)
 - Advocates for more utility dollars/flexibility for energy assistance and energy efficiency and liaises with utilities and agencies
- **Highlights**
 - ~\$18 million leveraged from IOUs and 2 gas utilities in 2024-2025 for low-income Wx
 - Led first statewide utility/agency summit

Key takeaways

- **Utility dollars benefit the WAP**
 - E.g., unit counts, lower DOE ACPU
- **Utility landscapes vary by state**
- **DOE offers funding for utility advocacy and coordination with the Optional Budget Category of Leveraged funds.**

Peer Exchange

- Do utility or state funds come through your state and/or go directly to the local agencies?
- What are the Pro's to working with your state's leveraged funding partners?
- What are the Con's or concerns with your state's leveraged funding partners (utility, state, LIHEAP?)



Our Approach

- Allow the agencies to build on existing relationships; assist where necessary
 - Presentation template
 - Meeting w/utility board
 - QCI
 - Photos, videos and write up
- Get approval for use of photos upfront from clients and utility
- Enlist the team to support
 - Agency cooperation
 - QCI
 - Rebate program

Investing in Georgia's Energy, Land, and Water Resources



Basic Project Guidelines



- \$144,000 provided by Fort Valley Utility Commission to Middle GA Community Action Council (MGCAC) for weatherization assistance to eligible homeowners in the FVUC coverage area
- Weatherization assistance will be provided by employees of MGCAC and/or certified contractors
- Energy audits and QCI inspections will be completed on all homes in the project



How Recipients are Chosen



- Applicant qualifies for weatherization assistance
- Applicant is a Ft Valley Utility Commission customer
- Home is within the Ft Valley, GA city limits
- Home has not been previously weatherized (within guidelines)
- Priority given to elderly or disabled clients and households with high energy burdens



How the Funds Will Be Used



- **Weatherization**

Approximately \$65,000 - \$70,000 to weatherize 6-8 homes

- Applicants meet the recipient qualifications
- Spend approximately \$8,500/home
- May combine with other DOE or HHS funds

- **Readiness**

Approximately \$65,000 to make structural repairs on 3-4 additional homes

- Applicants meet the recipient qualifications, but homes need “readiness” work to repair structural damage before weatherization (ex. roof repair/replacement or mold remediation)
- Spend approximately \$15,000-\$20,000/home
- Combine with approximately \$8500/home from other DOE or HHS funds to weatherize

- **Health & Safety**

Any remaining funds will be used to augment health and safety measures for homes weatherized within the FVUC footprint during the project, or to weatherize additional home(s) of eligible applicants

Investing in Georgia's Energy, Land, and Water Resources

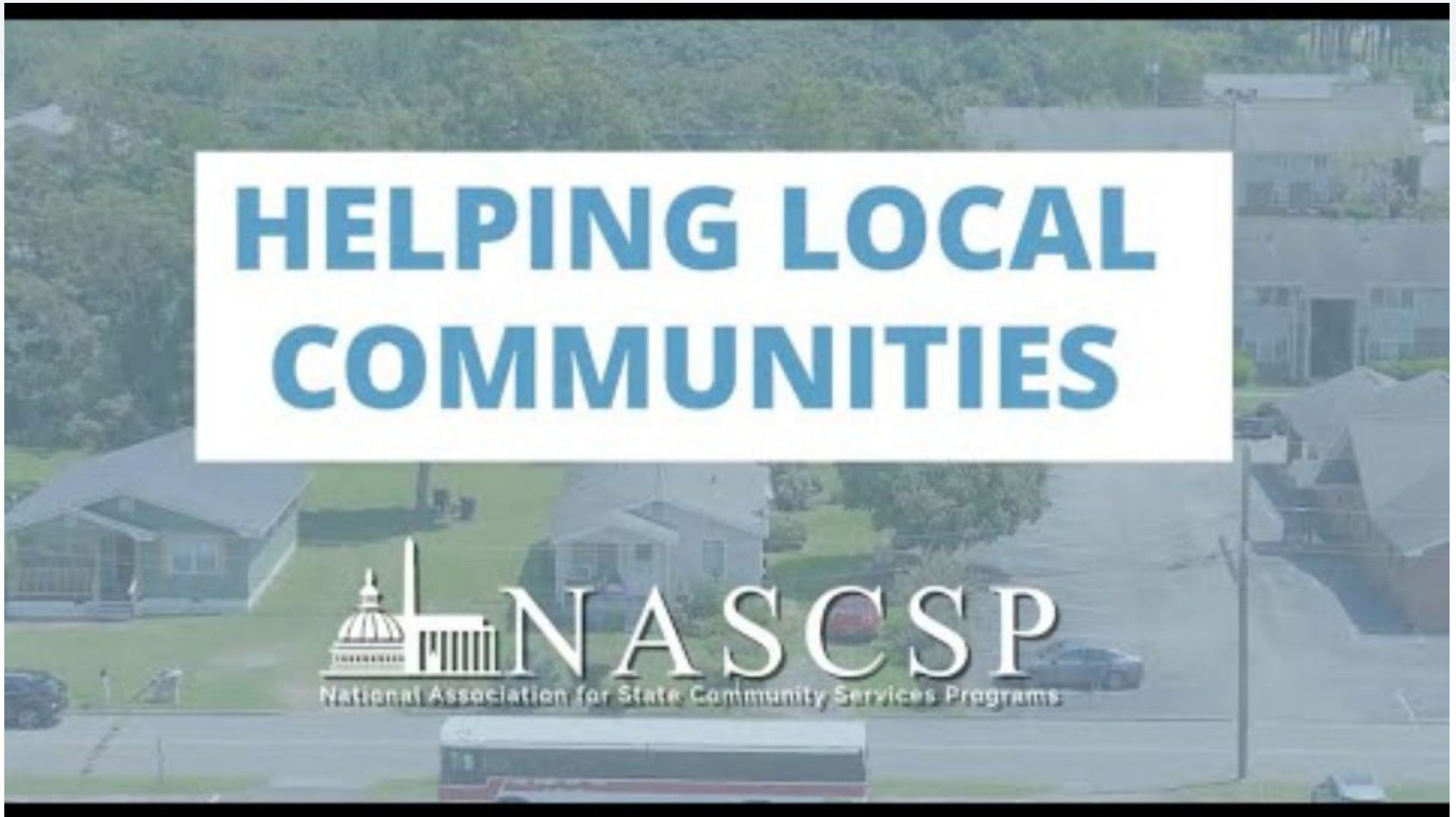


Other Items



- Photos- before and after
- Link to MGCAC and/or GEFA on FVUC website
- Publish project results on FVUC, MGCAC, GEFA and DOE websites

Investing in Georgia's Energy, Land, and Water Resources



Investing in Georgia's Energy, Land, and Water Resources



Indiana Community Action Association **Leveraging and Collaboration**

Presented by: Christin Willman

Indiana Snapshot 2026



- 19 Community Action Agency WAP Subgrantees
- 92 Counties Served
- Grantee DOE WAP Allocation: \$10,914,564

IN-CAA

“We Are Committed To Building Strategic Partnerships”

- Relationships can take months and even years to build “LONG HAUL”
- You must be committed to “NEVER GIVE UP”
- “EDUCATING” your partner on needs is paramount
- Don’t be afraid of “BIG ASKS”
- There is no such thing as “TOO SMALL OF A PARTNER”

Side Note: You might make a new friend or two along the way



Indiana Housing and Community Development Authority (IHCDA)

Citizen's Action Coalition (CAC)



Longest Standing and Most Impactful Relationships for WAP



IHCDA

**\$1,300,000 Duke-CAC-INCAA
Rebates on WAP Measures
H&S Funding \$149,657.38**

\$1,000,000 Weatherization Training Center DOE/IIJA

ITI Training For Fiscal and HR Training
LIPEAP Fiscal Support
Indiana Community Action Poverty Institute

30 Year Partnership began when WAP
funding at state level migrated from FSSA
to IHCDA

Citizen's Action Coalition

Indiana's oldest and largest consumer and environmental advocacy organization. Since our inception in 1974, we've helped to save Hoosiers more than \$10 billion in excess utility charges



2026: 1.6 Million

Duke Share The Light

Source: Settlement Dollars From Duke/Cinergy Merger
and Contributions from Duke Energy Customers

2026 Allocation: \$400,000

3% for CAA Admin; 3% for IN-CAA Admin

Utilized For: Energy Assistance Supplement For CAA

½ for Summer Assistance

½ for Winter Assistance

Max: \$300 per client

NISPCO GAS

Source: Settlement Agreement-Citizen's Action Coalition

Duration: Two years

Annual Payment: \$100,000

CAA Admin: 10%

IN-CAA Admin: \$4,900

Utilized For: Energy Assistance Supplement, Outreach for WAP/Energy Assistance, Staff Education, Utility Deposit, Additional Bill Payment

NIPSCO Electric

- Duration: Three Years
- \$100,000 Annual Payment
- CAA Admin: 10%
- IN-CAA Admin: \$6,450

How Funds Are Utilized: Health & Safety Supplement for WAP Dwellings

Can Be Used in Conjunction with Weatherization Readiness Funds

Data Center Settlements

How Did This Happen ?

- Partnership: Citizen's Action Coalition

What IN-CAA is receiving

- Settlements from three data center companies

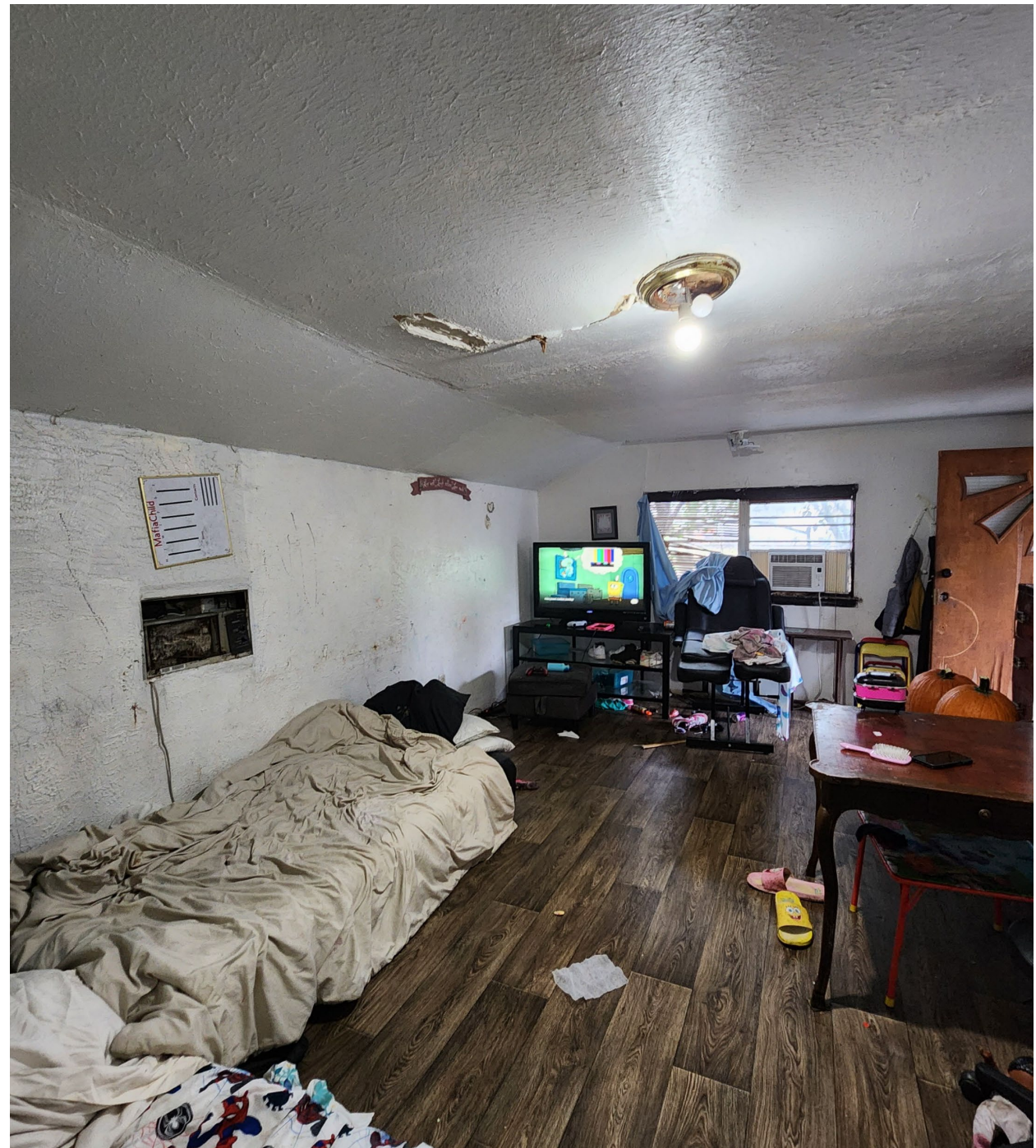
Settlement:

- Amount: \$500,000 from each data center company
- Duration: Once a year for FIVE years (each)
- Restrictions: Health, Safety, and Energy; and Low Income
- Total: 7.5 MILLION (yes, million!) Dollars

IN-CAA Plans to Utilize Funds from Data Center Settlements

- Healthy Homes Pilot Study with Local Children's Hospital with the Target Client Being High Risk Asthma Children
- \$1,500 Incentive for Installing ERV to Address ASHRAE 62.2 in WAP Homes
- ERV Training for WAP Network
- "Solar For Some" Installing Solar on WAP Client Homes
- TBD: We are taking suggestions and brainstorming 😊

And we are so excited!!







Partnerships Keep Growing !

Additional Positive Partnership Outcomes from Healthy Homes Pilot Project

- Community Action of Greater Indianapolis has Pledged \$10,000 to Pilot Study Client #1 Homes
- IHEDA Healthy Homes Funding on Future Pilot Study Homes
- Insulation Manufacturer has Pledged to Supply Certified Asthma & Allergy Friendly Insulation for all Healthy Homes Pilot Projects
- Citizen's Energy has Pledged to Provide High Efficiency Furnace
- There are a few other Pledges in the Works

The REAL HEROS in this story are the relentless fighters and watch dogs who challenge and fight against the utility companies for settlement fund are the staff at Citizen's Action Coalition; and the long-term Grantee IHEDA

www.citact.org

www.in.gov/ihead

Thank you

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www.intelligentweatherization.org

We need your feedback please

