

State of Idaho
Weatherization Assistance Program
Program Year 2025 Grant Application
Annual File

Application for Federal Assistance SF-424		Version 02
*1. Type of Submission: <input type="checkbox"/> Preapplication <input checked="" type="checkbox"/> Application <input type="checkbox"/> Changed/Corrected Application	*2. Type of Application <input checked="" type="checkbox"/> New <input type="checkbox"/> Continuation <input type="checkbox"/> Revision	* If Revision, select appropriate letter(s) AC Increase Award, Increase Duration *Other (Specify)
*3. Date Received: 10/21/2024		4. Applicant Identifier:
5a. Federal Entity Identifier:	*5b. Federal Award Identifier: DE-EE0009899	
State Use Only:		
6. Date Received by State: 10/21/2024	7. State Application Identifier:	
8. APPLICANT INFORMATION:		
*a. Legal Name: Idaho Department of Health and Welfare		
*b. Employer/Taxpayer Identification Number (EIN/TIN): 826000995	*c. Unique Entity Identifier (UEI): WP92EVJB9HF9	
d. Address:		
*Street 1:	450 W. State St. - 2nd Floor	
Street 2:	_____	
*City:	Boise	
County:	Ada	
*State:	Idaho	
Province:	_____	
*Country:	USA	

*Zip / Postal Code 83702

e. Organizational Unit:

Division Name: Division of Welfare

Department Name: Dept. of Health and Welfare

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

Prefix: Mrs. *First Name: Lisa

Middle Name: _____

*Last Name: Johnson

Suffix: _____

Title: Program Manager

Organizational Affiliation: Division of Welfare

*Telephone Number: 208-334-5739 Fax Number: 208-334-5817

*Email: Lisa.Johnson@dhw.idaho.gov

9. Type of Applicant 1: Select Applicant Type:

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 Weatherization Assistance for Low-Income Persons _____

12. Funding Opportunity Number: DE-WAP-0002025

Title: 2025 Weatherization Assistance for Low Income Persons

13. Competition Identification Number: _____ Title: _____

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

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

Yes No Explanation:

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 comply with any resulting terms if I accept an award. I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties. (U. S. Code, Title 218, Section 1001)

** 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 specific instructions

Authorized Representative:

Prefix: Ms. *First Name: Janet_____

Middle Name: _____

Last Name: Sacks

Suffix: _____

*Title: Financial Executive Officer

*Telephone Number: 208-559-4977

Fax Number: 208-334-5694

* Email: Janet.Sacks@dhw.idaho.gov

*Signature of Authorized Representative:

*Date Signed:

***Applicant Federal Debt Delinquency Explanation**

The following should contain an explanation if the Applicant organization is delinquent of any Federal Debt.

U.S. Department of Energy
WEATHERIZATION ANNUAL FILE WORKSHEET

Grant: DE-EE0009899

State: IDAHO

Program Year: 2025

IV.1. Subgrantees

Grantee	City	Funding	Units
Community Action Agency, Inc.	Lewiston	\$597,402.69	41
Eastern Idaho Community Action Partnership, Inc.	Idaho Falls	\$394,873.52	28
El-Ada, Inc.	Boise	\$562,478.54	2
Metro Community Services	Caldwell	\$458,808.75	33
South Central Community Action Partnership	Twin Falls	\$325,391.96	20
SouthEastern Idaho Community Action Agency, Inc.	Pocatello	\$307,079.55	18
Totals		\$2,722,585.00	182

IV.2. WAP Production Schedule

Number of Units (Excluding reweatherized)	150
Rewatherized Units	32
Average Unit Costs, including Reweathering, Subject to DOE Program Rules*	
A. Total Vehicles & Equipment (\$5,000 or more) Budget	\$0.00
B. Total Units Weatherized	150
C. Units Reweatherized	32
D. Total Dwelling Units to be Weatherized and Reweatherized (B+C)	182
E. Average Vehicle & Equipment Acquisition Cost per Unit (A divided by D)	\$0.00
AVERAGE COST PER DWELLING UNIT (DOE RULES*)	
F. Total Funds for Program Operations**	\$1,542,844.00
G. Total Dwelling Units to be Weatherized and Reweatherized (from line D)	182
H. Average Program Operations Cost per Unit (F divided by G)	8,477.16
I. Average Vehicle & Equipment Acquisition Cost per Unit (from line E)	N/A
J. Total Average Cost per Dwelling (H plus I)	\$8,477.16

IV.3. Energy Savings

Idaho uses the WAP algorithm. The formula is the number of unit's times 29.3:

$$182 \text{ units} \times 29.3 \text{ MBTU} = 5,332.6 \text{ MBTUs (Million British Thermal Units)}$$

IV.4. DOE-Funded Leveraging Activities

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

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

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

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

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

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

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

Leveraged funds can be used

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

Idaho estimates being able to increase the number of homes weatherized by an additional two hundred (200) units during PY25 using leveraged funding.

IV.5. Policy Advisory Committee Members (names, groups, agencies)

PAC Name, Group, or Agency	Contact name, phone, e-mail
AARP	Lupe Wissel, 866-295-7284, Liwissel@aarp.org
AVISTA Utilities	Renee Zimmerman, 509-495-8273 renee.zimmerman@avistacorp.com
Bonneville Power Administration	John Williams, (208)867-4978, jjwilliams@bpa.gov
Community Council of Idaho	Irma Morin, (208)989-7917, imorin@ccimail.org
Idaho Governor’s Office of Energy & Mineral Resources	Kylie Bolland(208)332-1669, Kylie.Bolland@oer.idaho.gov
Idaho Power Company	Cheryl Paoli, (208)388-2679, cpaoli@idahopower.com
Idaho Public Utilities Commission	Curtis Thaden, (208)334-0322, Curtis.thaden@puc.idaho.gov
IDHW State Tribal Relations	Lisa Jaramillo, (208) 513-3508, Lisa.Jaramillo@dhw.idaho.gov
Intermountain Gas Company	Kathy Wold, (208)377-6179, Kathy.wold@intgas.com
Living Independence Network Corporation	Jeremy Maxand (208)336-3335, Jmaxand@lincidaho.org
Rocky Mountain Power	Charity Spires, (503)813-7228, charity.spires@pacificorp.com
South Central Community Action Partnership	Ken Robinette, (208)733-9351, ken@sccap-id.org

IV.6. State Plan Hearings

Hearing Date:				
January 15, 2025				
Newspaper Names and dates of publishing	Coeur d’Alene Press	Dec 17	Dec 18	Dec 19
	Idaho Press Tribune	Dec 16	Dec 23	Dec 30
	Idaho State Journal	Dec 14	Dec 18	Dec 21
	Idaho Statesman	Dec 11	Dec 18	Dec 27
	Lewiston Tribune	Dec 17	Dec 18	Dec 20
	Idaho Falls Post Register	Dec 17	Dec 18	Dec 20
	Magic Valley Times News	Dec 17	Dec 19	Dec 21

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IV.7. Miscellaneous

Recipient Business Officer and Recipient Principal Investigator

Recipient Business Officer: Lisa Johnson, 208-334-5739

Lisa.Johnson@dhw.idaho.gov

Recipient Principal Investigator: Lisa Johnson, 208-334-5739

Lisa.Johnson@dhw.idaho.gov

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

Idaho communicated a process with the network about areas for program improvement which were identified by CFI Group DOE 2019 American Customer Satisfaction Index (ACSI) and developed an action plan to enhance program management and implement process and quality improvements.

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

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

In accordance with 2 CFR 200.425(a)(2), only those Subgrantees expending more than \$1,000,000 in total federal funding annually will receive FINANCIAL AUDITS funding identified in the Grantee's SF-424a Budget.

**U.S. Department of Energy
WEATHERIZATION ASSISTANCE PROGRAM
SUBGRANTEE INFORMATION (Annual File)**

State: IDAHO Grant Number: DE-EE0009899 Program Year: 2024

Name: Community Action Partnership, Inc.
 Contact: Mark Fleming, Housing Programs Director
 DUNS: 21818786
 Address 1: 124 New 6th Street
 City: Lewiston State: ID Zip Code: 83501
 Phone: (208) 746-3351
 Fax: (208) 746-5456 Email: m.fleming@cap4action.org

Tentative allocation:	\$597,402.69
Planned units:	41
Type of organization:	Non-profit organization
Source of Labor:	Direct Service Provider and Contractors

Counties served:
Benewah, Bonner, Boundary, Clearwater, Idaho, Latah, Lewis, Kootenai, Nez Perce, Shoshone

Congressional Districts served:
ID-01

Name: Eastern Idaho Community Action Partnership, Inc.
 Contact: Brad Simmons, Weatherization Director
 DUNS: 092026863
 Address 1: 935 East Lincoln Road
 City: Idaho Falls State: ID Zip Code: 83401
 Phone: (208) 522-5391
 Fax: (208) 523-7878 Email: bsimmons@eicap.org

Tentative allocation:	\$394,873.52
Planned units:	28
Type of organization:	Non-profit organization

Counties served:
Bonneville, Butte, Clark, Custer, Fremont, Jefferson, Lemhi, Madison, Teton

Congressional Districts served:
ID-02

Source of Labor:	Direct Service Provider and Contractors
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Name: El-Ada, Inc.
 Contact: Kevin Viggers, Weatherization Director
 DUNS: 098803364
 Address 1: 701 East 44th Street, Suite 1
 City: Garden City State: ID
 Phone: (208) 377-0700
 Fax: (208) 377-0859 Email: kviggers@eladacap.org

Zip Code: 83714

Tentative allocation:	\$562,478.54
Planned units:	42
Type of organization:	Non-profit organization
Source of Labor:	Direct Service Provider and Contractors

Counties served:
Ada, Owyhee
Ada, Elmore

Congressional Districts served:
ID-01
ID-02

Name: Metro Community Services
 Contact: Rito Reynoso, Weatherization Director
 DUNS: 099324907
 Address 1: 4307 Skyway Street
 City: Caldwell State: ID
 Phone: (208) 459-0065
 Fax: (208) 455-2342
 Email: rito@metrocommunityservices.net

Zip Code: 83605

Tentative allocation:	\$458,808.75
Planned units:	33
Type of organization:	Non-profit organization
Source of Labor:	Direct Service Provider and Contractors

Counties served:
Adams, Boise, Canyon, Gem, Payette, Valley, Washington

Congressional Districts served:
ID-01

Name: South Central Community Action Partnership
 Contact: Rod Burk, Weatherization Manager
 DUNS: 70023569
 Address 1: PO Box 531
 City: Twin Falls State: ID Zip Code: 83303-0531
 Phone: (208) 733-9354
 Fax: (208) 733-9355 Email: rod@sccap-id.org

Tentative allocation:	\$325,391.96
Planned units:	20
Type of organization:	Non-profit organization
Source of Labor:	Direct Service Provider and Contractors

Counties served:
Blaine, Camas, Cassia, Gooding, Jerome, Lincoln, Minidoka, Twin Falls

Congressional Districts served:
ID-02

Name: SouthEastern Idaho Community Action Agency, Inc.
 Contact: Rick Burgin, Weatherization Director
 DUNS: 073077356
 Address: 1261 Wilson Avenue, Suite E
 City: Pocatello State: ID Zip Code: 83201
 Phone: (208) 232-1114
 Fax: (208) 237-3951 Email: rburgin@seicca.org

Tentative allocation:	\$307,079.55
Planned units:	18
Type of organization:	Non-profit organization
Source of Labor:	Direct Service Provider and Contractors

Counties served:
Bannock, Bear Lake Bingham, Caribou, Franklin, Oneida, Power

Congressional Districts served:
ID-02

Budget Information – Non-Construction Programs

OMB Approval No.0348-0044

1. Program/Project Identification Number: DE-EE0009899	2. Program/Project Title: Weatherization Assistance Program
3. Name and Address: Idaho Department of Health and Welfare 450 West State St., 2 nd Floor Boise, ID 83702	4. Program/Project Start Date: 04/01/2025
	5. Completion Date: 03/31/2026

Section A – Budget Summary

Grant Program Function or Activity (a)	Catalog of Federal Domestic Assistance Number (b)	Estimated Unobligated Funds		New or Revised Budget		
		Federal (c)	Non-Federal (d)	Federal (e)	Non-Federal (f)	Total (g)
1. Federal	81.042			\$2,855,529.00		
2.						
3.						
4.						
5. Totals		\$		\$2,855,529.00		

Section B – Budget Categories

Grant Program, Function or Activity					Total (5)
6. Object Class Categories	(1) Grantee Administration	(2) Subgrantee Administration	(3) Grantee T&TA	(4) Subgrantee T&TA	
a. Personnel	\$60,356.00				\$60,356.00
b. Fringe Benefits	\$31,102.00				\$31,102.00
c. Travel			\$13,904.00		\$13,904.00

d. Equipment					
e. Supplies	\$1,500.00				\$1,500.00
f. Contractual		\$357,905.00		\$116,624.00	\$474,529.00
g. Construction					\$0.00
h. Other					\$0.00
i. Total Direct Charges (sum of 6a-	\$92,958.00	\$357,905.00	13,904.00	\$116,624.00	\$581,391.00
j. Indirect Charges	9,089.00				\$9,089.00
k. Other T&TA			\$93,543.00		\$93,543.00
k. Totals (sum of 6i and 6k)	\$102,047.00	\$357,905.00	\$107,447.00	\$116,624.00	\$684,023.00
	Grant Program, Function or Activity				Total (10)
6. Object Class Categories	(6) Program Operations	(7) Health and Safety	(8) Liability Insurance	(9) Leveraging	
a. Personnel					\$0.00
b. Fringe Benefits					\$0.00
c. Travel					\$0.00
d. Equipment					\$0.00
e. Supplies					\$0.00
f. Contractual	\$1,542,844.00	\$277,847.00	\$45,000.00	\$6,000.00	\$1,871,691.00
g. Construction					\$0.00
h. Other					\$0.00
i. Total Direct Charges (sum of 6a-	\$1,542,844.00	\$277,847.00	\$45,000.00	\$6,000.00	\$1,871,691.00

j. Indirect					\$0.00
k. Totals (sum of 6i and 6j)	\$1,542,844.00	\$277,847.00	\$45,000.00	\$6,000.00	\$1,871,691.00
	Grant Program, Function or Activity				Total (12)
6. Object Class Categories	(11) Financial Audit	Weatherization Readiness			
a. Personnel					\$0.00
b. Fringe Benefits					\$0.00
c. Travel					\$0.00
d. Equipment					\$0.00
e. Supplies					\$0.00
f. Contractual	\$18,000.00	\$281,815.00			\$299,815.00
g. Construction					\$0.00
h. Other					\$0.00
i. Total Direct Charges (sum of 6a-6h)	\$18,000.00	\$281,815.00			\$299,815.00
j. Indirect					\$0.00
k. Totals (sum of 6i and 6j)	\$18,000.00	\$281,815.00			\$299,815.00
Grand Totals	\$1,662,891.00	\$917,567.00	\$152,447.00	\$122,624.00	\$2,855,529.00
7. Program Income					\$0.00

SF-424A (Rev. 4-92)
Prescribed by OMB Circular A-
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U.S. DEPARTMENT OF ENERGY



BUDGET JUSTIFICATION FOR FORMULA GRANTS (Budget)

Applicant: Idaho Department of Health and Welfare Budget Period: 04/01/2025 To: 03/31/2026
 Award Number: DE-EE0008988

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

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

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

Direct Personnel Compensation:

<u>Position</u>	<u>Salary/Rate</u>	<u>Time</u>	<u>Direct Pay</u>
Program Specialist	\$27.70	1,880 hours	\$ 52,076.00
Program Manager	\$41.40	200 hours	\$ 8,280.00
		Total	\$ 60,356.00

2. FRINGE BENEFITS

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

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

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

- 6.20% FICA SSDI
- 1.45% FICA SSHI
- 0.00% Unemployment Insurance
- 0.69% Life Insurance
- 11.96% Retirement
- 0.00% Sick Leave
- 2.00% Human Resources
- 1.05% Workman’s Compensation
- 28.18% Health Insurance
- 51.53% Total Fringe Rate**

Fringe Benefits Calculations

Position	Direct Pay	Rate	Benefits
Program Specialist	\$ 52076.00	51.53%	\$ 26,835.00
Program Manager	\$ 8,280.00	51.53%	\$ 4,267.00
		Fringe Benefits Total	\$ 31,101.45
		Rounded Total	\$ 31,102.00

3. TRAVEL

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

<u>Purpose of Trip</u>	<u>Number of Trips</u>	<u>Cost Per Trip</u>	<u>Total</u>
PY25 NASCAP Conferences (fall)	2	\$2,660.00	\$5,320.00

PY26 NASCAP Conference (Spring)	2	\$3,435.00	\$6,870.00
Fiscal/Admin Monitoring On-site visits	5	\$342.80	\$1,714.00
		Total	\$13,904.00

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

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

4. EQUIPMENT - Generally defined as an item with an acquisition cost excess of \$5,000 and a useful life expectancy of more than one year. Further definitions can be found at 10 CFR 600.

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

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

5. SUPPLIES - Generally defined is an item with an acquisition cost of \$5,000 or less and a useful life expectancy of less than one year. Supplies are generally consumed during the project performance. Further definitions can be found in 10 CFR 600.

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 applies for this project.

<u>General Category</u>	<u>Cost</u>	<u>Justification of Need</u>
Printing	\$1,500.00	Public Hearing Notices – required

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.

Costs are based on prior purchase costs.

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 II.3).

<u>Name of Proposed Sub</u>	<u>Total Cost</u>	<u>Short Work Description</u>
Direct Service Providers listed In Annual File, Sect. IV.1.	\$2,646,035.00	Includes: All funds allocated to Direct Service Provider: Administration: \$357,905.00; T&TA: \$116,624; Program Operations: \$1,542,844.00; Health & Safety: \$277,847.00; Liability Insurance: \$45,000.00; Financial Audit:\$18,000.00; Leveraging:\$6,000.00; and Wx Readiness: \$281,815.00
Contracts and Subgrants Total	\$2,646,035.00	

7. OTHER DIRECT COSTS - Other direct costs are items that cannot be properly included in the above 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, subscriptions costs, printing costs, etc.

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

<u>General Description</u>	<u>Cost</u>	<u>Justification of Need</u>
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b. Please provide a basis of cost for each item listed above. Examples include vendor quotes, prior purchases of similar or like items, published price list, etc.

8. INDIRECT COSTS –

- a. Are the indirect costs 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.

The IDHW Indirect Cost Agreement was approved by the Department of Health and Human Services on November 3, 2024. It went into effect on January 1, 2021. Please see the attached Cost Allocation Plan to view the approval letter from HHS.

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

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

Name: Janet Sacks

Phone Number: 208-559-4977

Indirect costs calculations:

<u>Indirect Cost Account</u>	<u>Direct Total</u>	<u>Indirect Rate</u>	<u>Total Indirect</u>
PY25 Indirect	\$2,846,440.00	.3193%	\$ 9,088.68
	\$.32	.100%	\$.32
Total			\$ 9,089.00

STATE PLAN/MASTER FILE WORKSHEET

V.1 Eligibility

V.1.1 Approach to Determining Client Eligibility

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

Idaho utilizes the definition of income as defined in the most current guidance received by DOE for the grant application program year.

Describe what household eligibility basis will be used in the Program

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

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

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

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

V.1.2 Approach to Determining Building Eligibility

Procedures to determine that units weatherized have eligibility documentation

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

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

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

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

- A list of possible measures that may be installed;
- The residence is not currently for sale by owner of the property, nor is it designated for acquisition or clearance (foreclosure) by federal, state or local programs;

- That rent will not be increased, or renters evicted within 12 months' time of the completion of the weatherization services performed at the dwelling.

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

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

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

Describe Re-weatherization compliance

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

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

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

In the event of a state or federally declared natural or manmade disaster or national emergency, Idaho will seek approval from the DOE Project Officer for permission to proceed with a determination of homes available for Reweatherization. While DOE will continue to require these homes to be reported separately, Grantees may count these homes as completions for the purposes of compliance with the per home expenditure limit in 440.18. Each dwelling unit must receive a new energy audit which considers any previous energy conservation improvements to the dwelling. In compliance with WPN 24-1, these homes can be reweatherized before the 15-year rolling date requirement.

Describe what structures are eligible for weatherization

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

Describe how Rental Units/Multifamily Buildings will be addressed

Rental dwellings are eligible for weatherization services when an eligible renter occupies them. Once the renter is determined eligible for weatherization services and

prior to scheduling an Energy Audit, the renter and owner must certify in writing they accept without protest the special conditions outlined in the Homeowner and Renter Agreement.

For example:

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

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

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

1. The Direct Service Provider, as the initial point of contact, will contact the property owner to determine if the rent increase was due to provision of weatherization services to the household.
2. If it is determined by the Direct Service Provider that the rent increase is due to the weatherization measures provided, IDHW will be notified so a letter can be sent to the property owner explaining the program guidelines. Specifically, that rent increases are not permitted within twelve (12) months of weatherization services performed and this was part of the Owner/Renter Agreement form they signed.
3. The Direct Service Provider will follow up with the tenant to ensure the rent increase is discontinued to comply with the language on the Owner/Renter Agreement.

Multifamily Units

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

Low-Income Subsidized Multi-Family Rental Dwellings

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

Non-Subsidized Multifamily Rental Dwellings

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

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

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

Describe the Deferral Process (Walk-Away Policy)

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

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

Weatherization Readiness Fund Plan

Weatherization Readiness Funds (WRF) will be used to address/prevent deferrals. These funds will be used for DOE WAP jobs where a deferral would normally be

required. These funds will allow the identified deferral condition to be corrected so that Weatherization work may begin or resume and must in a DOE completed unit.

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

Allowable use of WRF

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

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

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

Idaho will include DOE WRF jobs in their desk monitoring.

V.1.3 Definition of Children

Definition of Children (below age): 19

V.1.4 Approach to Tribal Organizations

Recommend tribal organization(s) to be treated as local applicant? No

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

Services to Idaho Native American Tribes

Five (5) Native American tribes reside in Idaho: Kootenai, Coeur d’Alene, and Nez Perce tribes in the northern part of Idaho, and Shoshone-Bannock and Shoshone-Paiute tribes in southern Idaho. The U.S. Department of Energy allows the Grantee and local Direct Service Providers to provide service to tribal members living on the reservations. Direct Service Providers are to ensure services are provided proportionately to low-income Native Americans in their respective service areas. The Grantee will work with Direct Service Providers and encourage shared initiatives with tribal housing authorities. Direct Service Providers are required to establish a referral system with tribal authorities to ensure that tribal members residing on reservations are adequately and effectively served.

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

V.2 Selection of Areas to Be Served

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

V.3 Priorities for Service Delivery

Priority service shall be given to households with:

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

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

V.4 Climatic Conditions

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

Direct Service Provider	City	County	HDD	Elevation
CAP	Lewiston	Nez Perce	5,220	745
CAP	Golden	Idaho	10,582	4,354
MCS	Caldwell	Canyon	6,120	2,375
MCS	McCall	Valley	9,549	4,800
EICAP	Idaho Falls	Bonneville	7,509	4,705
EICAP	Drummond	Fremont	10,024	5,610
El-Ada	Boise	Ada	5,022	3,048
El-Ada	Riddle	Owyhee	7,349	5,367
SCCAP	Twin Falls	Twin Falls	6,565	3,734
SCCAP	Hailey	Blaine	8,542	5,318
SEICAA	Pocatello	Bannock	7,461	4,462
SEICAA	Georgetown	Bear Lake	9,010	6,043

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

V.5 Type of Weatherization Work to Be Done

V.5.1 Technical Guides and Materials

SWS Incorporation and Implementation

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

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

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

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

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

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

All Program Guidance updates are communicated by the Grantee to the Direct Service following the process detailed below:

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

The following language comes from the subgrantee contracts:

“Acceptance and signature on the contract providing DOE PY2025 funding to the subgrantee agency, will serve as proof of receipt of the SWS and Idaho Weatherization Operations Manual (IWOM).”

The Subgrantee must:

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

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

V.5.2 Energy Audit Procedures Audit Procedures and Dates Most Recently Approved by DOE

Single Family Units

The ECOS Energy Audit which incorporates the mechanical/architectural measure interaction requirement of DOE was approved 07/05/2022. ECOS is a web-based platform (Visual Basic.NET) that integrates with Idaho’s WITSWeb data tracking system.

Manufactured Housing Units

The ECOS Energy Audit incorporates the mechanical/architectural measure interaction requirement of DOE was approved on 07/05/2022. This application is also approved for use when auditing mobile homes.

Multi-Family Units

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

Comments:

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

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

Idaho may request approval to move to a new Energy Audit Tool during PY25.

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

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

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

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

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

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

Idaho has received approval to use the DOE-approved optional regional Priority List (PL) and Audit Procedures for Single Family Site-Built (SB) and Manufactured Homes (MH).

10 CFR 440.21(g) allows for energy audits to be conducted using a predefined PL when "similar dwelling units without unusual energy-consuming characteristics" exist.

Idaho understands that these optional regional PL are not exhaustive and do not include every measure which may be cost effective on a site-specific basis. Dwelling unit needs which include any measure(s) not included within the PL or if the home does not meet the basic requirements of the PL, would then require a site-specific energy audit be run in compliance with the Grantee's most recently DOE-approved energy audit procedures.

Fuel Switching

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

V.5.3 Final Inspection

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

1. Adult member or designated head of household is present during inspection.
2. Installed materials conform to DOE standard for weatherization materials.
3. Recommendations in the Energy Audit were followed.
4. All materials charged to the job were installed properly and to standards and specifications found in the Idaho Weatherization Operations Manual (IWOM).
5. Any necessary minor adjustments are made.
6. Participants are educated on operation of newly installed measures, including equipment operation and maintenance.
7. Work order form is completed with all related information including documented justification for changes.
8. Participant and/or Property Owner are satisfied, and their signature is

obtained on the Job Completion Form.

9. A Home Energy Quality Control Inspector (QCI) will use a Quality Assurance Job Inspection Form to review and sign-off on jobs reported as complete.

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

Inspections are completed by QCI certified staff on 100% of completed units. The inspecting QCI will not be involved in the prior work on the home either as the energy auditor or as a member of the crew. Any agency not meeting this requirement will be subject to increased monitoring and/or additional requirements.

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

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

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

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

V.6 Weatherization Analysis of Effectiveness

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

their abilities to serve the citizens of Idaho.

Analysis of effectiveness of weatherization projects is made through the energy audit software, ensuring at least a savings-to-investment ratio of 1.0. Monthly production and energy usage data obtained through monthly DSP reporting. Comparative data, annual programmatic and onsite monitoring reports, and meetings with the WX Managers provide the basis for identifying deficiencies and opportunities for T&TA either across the network or for individual DSPs.

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

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

V.7 Health and Safety

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

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

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

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

V.8 Program Management

V.8.1 Overview and Organization

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

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

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

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

V.8.2 Administrative Expenditure Limits

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

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

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

V.8.3. Monitoring Activities

Purpose

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

Procedure

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

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

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

Monitoring results, and accompanying documentation, are submitted to the Direct Service Provider. Direct Service Providers are required to correct any deficiencies identified during the monitor using non-federal funds. Monitor results also will be used to inform T&TA activities as a means of improving work outcomes. Identified noncompliance will require immediate corrective action to bring the Direct Service Providers into compliance with program requirements.

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

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

Monitoring

Monitoring activities comprise of three major parts:

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

Idaho will not be utilizing the 'exemplary agency' waiver for the grant period. All Direct Service Providers will receive onsite reviews (of completed jobs) and file reviews.

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

WX review:

- | | |
|---|-------------------|
| 1. Community Action Agency, Inc. | 05/13/25-05/17/25 |
| 2. Eastern Idaho Community Action Partnership, Inc. | 06/10/25-06/14/25 |
| 3. El Ada, Inc. | 04/22/24-04/26/25 |
| 4. Metro Community Services | 05/20/25-05/24/25 |
| 5. South Central Community Action Partnership | 04/29/25-05/03/25 |
| 6. SouthEastern Idaho Community Action Agency, Inc. | 06/17/25-06/21/25 |

Financial/Administrative review:

- | | |
|--|-------------------|
| 1. Community Action Agency, Inc. | 04/15/25-04/19/25 |
| 2. Eastern Idaho Community Action Partnership, Inc. | 04/22/25-04/26/25 |
| 3. El Ada, Inc. | 05/06/25-05/10/25 |
| 4. Metro Community Services | 05/13/25-05/17/25 |
| 5. South Central Community Action Partnership | 05/20/25-05/24/25 |
| 6. South-Eastern Idaho Community Action Agency, Inc. | 04/29/25-05/03/25 |

Projected Dates of Monitoring Visits

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

Approach

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

Visit

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

Tracking and Analysis

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

Reporting

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

V.8.4 Training and Technical Assistance Approach and Activities

Training and Technical Assistance Objective

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

Types of Technical Training

During PY 2025, Subgrantees will evaluate the needs of their staff, conduct self-assessments, and review past monitoring reports to determine what training is needed for each WAP employee. Individual training is determined for each employee which aligns with DOE's JTA for their perspective role. Subgrantees will develop a T&TA plan for the upcoming year. In addition, annual monitoring results and visits, program manager meetings (in-person or via teleconference), and release of program guidance will be used to assess Direct Service Provider training needs.

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

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

Comprehensive Training

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

See the attached T&TA planning document that identifies staff training to occur in PY25.

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

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

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

Specific Training

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

Direct Service Provider Peer Exchange

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

Other Trainings

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

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

The Grantee focuses on identifying program gaps, identify T&TA needs of all DSP's, performs or coordinates T&TA and tracks T&TA records statewide. We will also utilize them to assist with cross-training direct services providers regarding items of concern identified in the audit.

Client Education

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

Training and Technical Assistance Plan T&TA Funding Allocation

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

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

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

Provided Training

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

Lead Training Certification

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

QCI Certification

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

There are currently fourteen (14) QCI-certified Inspectors in Idaho's Weatherization network of six (6) Direct Service Providers and one (1) QCI-certified Inspector with the Grantee staff for a total of fifteen (15) in Idaho. Each Direct Service Provider has a minimum of one (1) QCI-certified Inspector with the majority of Direct Service Providers having more than one staff person certified.

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

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

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

Training Assessment

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

Training Priority Development

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

The current priorities for training are as follows:

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

V.9 Energy Crisis and Disaster Plan

In the event of state or federal declared natural or manmade disaster, Idaho may request permission to use DOE WAP resources to provide emergency services to low-income individuals and families in the designated disaster area. Idaho will enlist their existing weatherization network to appropriately follow the Disaster plan as stated in the Idaho Weatherization Operations Manual (IWOM) which follows the DOE program requirements as stated in WPN 24-1