

**U.S. Department of Energy**  
**WEATHERIZATION ANNUAL FILE WORKSHEET**  
**Grant: EE0009940    Amendment: M000    State: WI    Year: 2023**

**Budget Period 7/01/2023 – 6/30/2024**

**IV. ANNUAL FILE Formula**

<b>SubGrantee</b>	
Admin	\$996,818
Operations & Support	\$6,857,596
Financial Audit	\$25,000
Liability	\$40,000
Health & Safety	\$350,000
Agency T&TA	\$287,000
WX Readiness	\$909,264
<b>Subtotal</b>	<b>\$9,465,678</b>
Leveraging	\$300,000
State Administration	\$836,361
State T&TA	\$1,619,156
<b>Subtotal</b>	<b>\$2,755,517</b>
<b>Total</b>	<b>\$12,221,195</b>

Subgrantee	City	Funding*	Units
Advocap, Inc.	Fond du Lac	\$49,833	
Ashland County Housing Authority	Mellen	\$2,034,051	229
Rock/Walworth Community Action	Beloit	\$47,907	
CAP Services, Inc.	Stevens Point	\$39,410	
Central Wisconsin Community Action Council, Inc.	WI Dells	\$38,552	
Partners for Community Development, Inc.	Sheboygan	\$2,557,510	314
Hartford Community Development Authority	Hartford	\$35,248	
La Casa De Esperanza, Inc.	Waukesha	\$4,110,881	416
Newcap, Inc.	Oconto	\$74,253	
North Central Community Action Program, Inc.	WI Rapids	\$83,590	
Outagamie County Housing Authority	Appleton	\$28,618	
Project Home, Inc.	Madison	\$39,801	
Racine-Kenosha Community Action Agency	Racine	\$74,609	
Southwestern Wisconsin Community Action Program, Inc.	Dodgeville	\$19,808	
West Central Wisconsin Community Action Agency, Inc.	Glenwood City	\$62,128	
Western Dairyland Economic Opportunity Council, Inc.	Independence	\$41,964	
Couleecap, Inc.	Westby	\$41,361	
Community Relations – Social Development Commission	Milwaukee	\$101,138	
<b>TOTALS</b>		<b>\$9,465,678</b>	<b>959</b>

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**Selection of Subgrantees**

Weatherization services are provided on a statewide basis. The Division contracts with Community Action Agencies and a variety of other public and nonprofit entities to deliver weatherization services [440.15(a) (1)]. Public comment is solicited on the selection of subgrantees as part of the public hearing on the draft application for DOE funds [440.15(a)(2)]. In selecting subgrantees, preference is given to any agency with experience and performance in weatherization or housing renovation, in assisting low income persons in the area, and currently administering a timely and effective weatherization program [440.15(a)(2)(i,ii,iii)]. This is done to maintain stability so that clients can readily identify where they may receive needed services.

Selection of new or additional subgrantees will be made in accordance with the requirements of 440.15(d) and include consideration of:

- a. The extent to which the weatherization goals set forth in the contract are achieved in a timely fashion.
- b. The quality of work performed.
- c. The number, qualifications, and experience of the staff.
- d. The ability to secure volunteers, training participants, public service employment workers, and other federal or state training programs or resources.

If the Division finds that a subgrantee has failed to comply substantially and should be replaced, notice is given to the subgrantee of the failure and the action intended by the Division [440.15I].

**It is Wisconsin’s intent to allocate either Bipartisan Infrastructure Legislation (BIL) funding OR DOE Formula funding received under this plan to the network. However, all agencies will receive Weatherization Readiness Funding allocated under this plan. Those agencies with unit goals listed above will receive the formula funding and those without unit goals will receive BIL funding. Wisconsin’s rationale for this approach is twofold: It will allow agencies to demonstrate success in spending and production for both fund sources and will also allow compliance with the DOE directive prohibiting the co-mingling of BIL and DOE formula for the same activities. No agency will see a funding reduction under this approach. This concept has been also well received by the network in earlier discussions.**

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**IV.2 WAP Production Schedule**

<b>Average Unit Costs, Units Subject to DOE Project Rules</b>		
<b>VEHICLES &amp; EQUIPMENT AVERAGE COST PER DWELLING UNIT (DOE RULES)</b>		
A	Total Vehicles & Equipment (\$5,000 or more) Budget	\$0.00
B	Total Units Weatherized	959
C	Total Units Re-weatherized	13
D	Total Dwelling Units to be Weatherized and Re-weatherized (B+C)	972
E	Average Vehicle & Equipment Acquisition Cost per Unit (A divided by D)	\$0.00
<b>AVERAGE COST PER DWELLING UNIT (DOE RULES)</b>		
F	Total Funds for Program Operations	\$6,857,596
G	Total Dwelling Units to be Weatherized and Re-weatherized (from line D)	972
H	Average Program Operations Cost per Unit (F divided by G)	\$7,055.14
I	Average Vehicle & Equipment Acquisition Cost per Unit (from Line E)	\$0.00
J	Total Average Cost per Dwelling (H plus I)	\$7,055.14

**IV.3 Energy Savings**

Method used to calculate energy savings:             WAP algorithm     Other (describe below)

Method used to calculate savings description: For all but the most recent program year, natural gas and electricity savings for weatherized homes are measured using monthly utility billing data collected from Wisconsin’s five major investor-owned utilities. Billing data from pre- and post-weatherization periods are weather normalized, and pre-weatherization billing data from future program participants are used to correct for non-program factors. The consumption differences between the pre- and post-weatherization billing periods reflect the gas and electric savings for each treated home. Savings estimates are then coupled with data taken from the program’s tracking database to develop a statistical model to evaluate savings by measures installed, housing type and other characteristics.

Program Year	Estimate (Other/SES)		Actual	
	Units	Savings (MMBtus)	Units	Savings (MMBtus)
2023-2024	959	19,995		
2022-2023	1,046	21,744		
2021-2022	1,024	21,900	1052	21,958
2020-2021	1,118	23,911	1019	20,436
2019-2020	1,068	25,286	1017	20,394
2018-2019	1,014	24,007	982	20,062
2017-2018	787	18,633	925	18,660

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PY23 savings estimates (for homes that do not yet have post-weatherization history) are projections based on the measures installed and the statistical model of energy savings validated by data from PY22 and earlier. The savings are directly calculated from natural gas and electric utility billing data for PY18 through PY22. All billing data is weather normalized to account for the effect of year to year temperature variation on household energy use. The reference fuel price for natural gas is a seven-year average of the previous historical five years plus two future years. The reference price for electricity uses a five year historical average.

Energy savings, based on Wisconsin's 2022 Self Evaluation Savings (SES) study are projected to average 165 heating therms, or 16% per household and 1,275 baseload kilowatt hours (kWh), or 14% per household. Based on the fuel costs used in Wisconsin's Weatherization Assistant parameters, this equals an annual savings of \$400 per household served. The total energy savings for the planned 959 weatherized units in Wisconsin using DOE funds are projected to be 19,995 MMBtus annually, amounting to \$8.24 million Net Present Value (NPV) over the approximate 20-to-30-year life of the weatherization measures installed. The following calculations are based on Wisconsin Assessment of Energy and Cost Savings for Homes Treated under Wisconsin's Home Energy Plus Weatherization Program 2022. Wisconsin is in the process of completing another assessment of energy savings.

### **Fuel Prices for Weatherization Modeling**

The Division of Energy, Housing and Community Resources reviewed the procedures for identifying base-year fuel prices and the fuel-price-change indices used in Weatherization Assistant.

### **Base-Year Price Identification**

Wisconsin's methods for establishing base-year prices reflects the concept that energy prices will generally revert to the mean — i.e., that market prices will fluctuate over time and that market forces (supply and demand) will interact and revert to a mean price. In this context, the historic average price is relatively indicative of the long-term trend.

#### *Fuel Oil, Propane (L.P.), Electric*

Wisconsin uses the average price from the previous five heating seasons to identify the base-year price for these fuels.

#### *Natural Gas*

Wisconsin blends five historic-price data points and two anticipated price data points to identify the base-year price for natural gas. The base-year price equals the mean of five years of historic heating-season prices and two years of anticipated heating season prices (Source: U.S. Energy Information Administration (EIA) Short Term Outlook). The Division believes this approach is the best alternative considering that a blend of historic prices and anticipated prices would be a logical approach for identifying the base-year price for natural gas in the financial modeling.

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**Fuel-Price-Change Indexing**

To forecast future annual fuel-price changes, Wisconsin uses data from the EIA's Annual Energy Outlook (East North Central region).

The Division will use the base-year prices for Program Year 2023-2024 with the first full year of energy savings encompassing the heating season of 2024-2025 (i.e., the first full winter after weatherizing).

**IV.4 DOE-Funded Leveraging Activities**

Wisconsin has identified approximately \$300,000 in DOE leverage funds to provide staff oversight for the operation of the joint DOE/Public Benefits weatherization assistance program. Leveraged funds are used to continue program design work, assist subgrantees in training new personnel, work with property owner associations to increase the number of weatherized rental units, and coordinate utility providers contributions to the state Public Benefits funds.

DOE leverage funds are vital to the effective use of Public Benefits funds to increase the number of units and measures completed with DOE funds. Public Benefits funds allow the weatherization program to address water heater conversion, freezers, and electrical use, thereby providing a "whole house" approach to the program.

The combined weatherization program incorporates the DOE minimum program requirements of:

- Household eligibility
- Use of an approved audit system or measures list
- Household priority for service
- Meet or exceed materials standards
- Average DOE funds per unit does not exceed DOE's maximum
- Preference to existing DOE subgrantees

Non-DOE funded units are reported as leveraged units.

**IV.5 Policy Advisory Council**

**Policy Advisory Council Members**

Jennifer Fischer	(608) 240-7460	Aging & Disability Resource Center of Dane County
Rose Strege	715-793-4862	Stockbridge Munsee Tribe
Sarah Schroeder	(608) 246-3444	Employment Resources, Inc. (Non-profit organization providing support services for individuals with disabilities)
Gary France	(715) 359-1075	France Propane Service, Inc. (Bulk fuel vendor)

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Tim Bruer	(608) 283-7678	Energy Services, Inc., Keep Wisconsin Warm Fund (Non-profit utility assistance fundraiser and WHEAP subcontractor)
Vicky Heinz	(608) 252-7395	Madison Gas & Electric (Utility provider)
Maricela Gaona	(414) 469-6435	Milwaukee County Department of Health and Human Services (WHEAP subgrantee)
Tom Mayne	608-797-6006	Coulee CAP (Subgrantee and CAP agency)
Karin Kirchmeier	(920) 459-2780 Ext. 101	Partners for Community Development (Subgrantee)
Brad Rose	(608) 267-9814	Public Service Commission (State entity for regulation of utilities)
Molly Calderon	(262) 657-2170	UMOS (WHEAP subgrantee)
Daliska Smith	(414) 906-2821	Social Development Commission (Subgrantee and City of Milwaukee social services organization)
Jason VanderVelden	920-426-0150	Advocap (Subgrantee, CAP agency)
Christine Carper	920-433-117	WEC Energy Group (Utility provider)
Dr. Brad Paul	(608) 244-0466	WISCAP Association (Association of Wisconsin CAP agencies)
Todd Stuart	(608) 441-5740	Wisconsin Industrial Energy Group (Non-profit ratepayer advocacy)
Tim Heinrich	(608) 837-2263	Municipal Electric Utilities of WI, Inc. (Municipal Utility Association)
Nora Lindgren	715-737-2439	Xcel Energy (Utility provider)
Veronica Stober	641-437-5362	Alliant Energy
Tom Content	(608) 957-8982	Citizens Utility Board of Wisconsin

**Policy Advisory Council Meeting**

Wisconsin’s Policy Advisory Council (PAC), named the Low-Income Energy Advisory Committee (LIEAC), was established to provide feedback to the Division on weatherization and energy assistance issues, including approval of annual plans. LIEAC meets, as needed. Per 10 CFR 440.17, LIEAC members are broadly representative of organizations and agencies, including consumer groups that represent low-income persons, particularly elderly, and low-income persons with a disability and low-income Native Americans in Wisconsin.

A LIEAC meeting will be conducted April 12, 2023, to obtain approval of the plan. Meeting minutes are included as Attachment X.

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**IV.6 Hearings and Transcripts**

**Notice of Public Hearing**  
**Division of Energy, Housing and Community Resources**  
**Department of Administration**  
**Telephonic Public Hearing**  
**Monday, April 3, 2023**  
**12:00 PM**  
**Join by phone**  
**Madison: 1(608) 571-2209**  
**Phone Conference ID: 725 820 527#**

In accordance with 10 CFR 440.14 the Division will conduct a Public Hearing to accept written comments and verbal testimony concerning the Division's draft Program Year (PY) 2023 Department of Energy (DOE), Weatherization Assistance Program Annual Plan and Master File.

Verbal testimony will be accepted telephonically on the draft DOE PY 2023 application to the U.S. Department of Energy for funding of the Weatherization Assistance Program (WAP) for low-income persons and on local operators of the program. Potential operators of the program include:

- ADVOCAP, Inc.
- Ashland County Housing Authority
- CAP Services, Inc.
- Central Wisconsin CAC, Inc.
- Community Action, Inc. of Rock/Walworth Counties
- Coulecap, Inc.
- Hartford Community Development Authority
- La Casa de Esperanza, Inc.
- Newcap, Inc.
- North Central CAP, Inc.
- Outagamie County Housing Authority
- Partners for Community Development, Inc.
- Project Home, Inc.
- Racine/Kenosha CAA
- Social Development Commission
- Southwestern Wisconsin CAP
- West Central Wisconsin CAP
- Western Dairyland EOC, Inc.

Final allocations will include adjustments from the draft application documents necessary to align with final DOE appropriations for WAP.

**Please Note: Public Hearing will occur via telephone**

Those wishing to speak shall call in by 12:00 PM, Monday, April 3, 2023, (608) 571-2209, Phone Conference ID: 725 820 527#

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Per DOE requirements, a transcriptionist will be present to transcribe the hearing and the transcript will be submitted as an attachment to the plan.

Written comments on the draft application items may be sent to the address or email below to arrive no later than 5:00 pm, Monday, April 3, 2023. Written comments will receive equal consideration with testimony given at the public hearing. If you would need other accommodations to participate, please let the Division know as soon as possible so that arrangements can be made. To obtain copies of the draft application documents, please use one of the following methods:

Access them online at

<https://energyandhousing.wi.gov/Pages/AgencyResources/weatherization.aspx> – select Draft PY 2023 DOE WAP Annual Plan and Draft PY 2023 DOE WAP Master Plan, or

Write to:

Weatherization Assistance Program  
DOA – Division of Energy, Housing and Community Resources  
PO Box 7970  
Madison, WI 53707-7970

Contact: Mary Meunier  
Email: [mary.meunier@wisconsin.gov](mailto:mary.meunier@wisconsin.gov); Phone: (608) 266-2758

**IV.7 Miscellaneous**

**Recipient Business Officer and Recipient Principal Investigator**

	<b><i>Business Officer</i></b>	<b><i>Principal Investigator</i></b>
Name	Susan Brown	Kris Haskin
E-mail Address	<a href="mailto:Susan.Brown@wisconsin.gov">Susan.Brown@wisconsin.gov</a>	<a href="mailto:Kristine.Haskin@wisconsin.gov">Kristine.Haskin@wisconsin.gov</a>
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