

**U.S. Department of Energy
WEATHERIZATION ANNUAL FILE WORKSHEET**
Grant: EE0009940 Amendment: M000 State: WI Year: 2024

Budget Period 7/01/2024 – 6/30/2025

IV. ANNUAL FILE Formula

Subgrantee	
Admin	\$836,361
Operations & Support	\$6,857,596
Financial Audit	\$25,000
Liability	\$40,000
Health & Safety	\$350,000
Agency T&TA	\$305,000
WX Readiness	\$1,075,460
Subtotal	\$9,489,417
Leveraging	\$300,000
State Administration	\$836,360
State T&TA	\$1,601,156
Subtotal	\$2,737,516
Total	\$12,226,933

Subgrantee	City	Funding*	Units
Advocap, Inc.	Fond du Lac	48,581	
Ashland County Housing Authority	Mellen	1,999,356	224
Rock/Walworth Community Action	Beloit	47,314	
CAP Services, Inc.	Stevens Point	38,434	
Central Wisconsin Community Action Council, Inc.	WI Dells	37,960	
Partners for Community Development, Inc.	Sheboygan	3,101,051	336
Hartford Community Development Authority	Hartford	20,368	
La Casa De Esperanza, Inc.	Waukesha	3,723,582	404
Newcap, Inc.	Oconto	76,356	
North Central Community Action Program, Inc.	WI Rapids	84,683	
Outagamie County Housing Authority	Appleton	27,659	
Project Home, Inc.	Madison	39,117	
Racine-Kenosha Community Action Agency	Racine	75,315	
Southwestern Wisconsin Community Action Program, Inc.	Dodgeville	20,467	
West Central Wisconsin Community Action Agency, Inc.	Glenwood City	63,084	
Western Dairyland Economic Opportunity Council, Inc.	Independence	43,470	
Coulecap, Inc.	Westby	42,620	
TOTALS		\$9,489,417	

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Selection of Subgrantees

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:

IV.2 WAP Production Schedule

Average Unit Costs, Units Subject to DOE Project Rules	
VEHICLES & EQUIPMENT AVERAGE COST PER DWELLING UNIT (DOE RULES)	
A Total Vehicles & Equipment (\$5,000 or more) Budget	\$0.00
B Total Units Weatherized	916
C Total Units Re-weatherized	48
D Total Dwelling Units to be Weatherized and Re-weatherized (B+C)	964
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	\$6,857,596
G Total Dwelling Units to be Weatherized and Re-weatherized (from line D)	964
H Average Program Operations Cost per Unit (F divided by G)	\$7,113.69
I Average Vehicle & Equipment Acquisition Cost per Unit (from Line E)	\$0.00
J Total Average Cost per Dwelling (H plus I)	\$7,113.69

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

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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)
2024-2025	964	18,373		
2023-2024	1,043	18,974		
2022-2023	1,046	21,744	943	17,702
2021-2022	1,024	21,900	1055	21,958
2020-2021	1,118	23,911	1020	20,436
2019-2020	1,068	25,286	1021	20,394

PY24 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 PY23 and earlier. The savings are directly calculated from natural gas and electric utility billing data for PY19 through PY23. 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 the previous calendar year average.

Energy savings, based on Wisconsin’s 2023 Self Evaluation Savings (SES) study are projected to average 148 heating therms, or 14% per household and 994 baseload kilowatt hours (kWh), or 12% per household. Based on the fuel costs used in Wisconsin’s Weatherization Assistant for the planned 964 weatherized units in Wisconsin using DOE funds are projected to be 18,373 MMBtus annually, amounting to \$8.64 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 2024.

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.

Electric

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Wisconsin uses the average price from the previous calendar year to identify the base-year price for this fuel.

Fuel Oil and Propane (L.P.)

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.

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 2024-2025 with the first full year of energy savings encompassing the heating season of 2025-2026 (i.e., the first full winter after weatherizing).

On an annual basis, Wisconsin reviews both future and past years data to determine fuel costs to be used in the WA software. Future fuel costs are used to determine the price indices in WA. All information is contained in the Fuel Price Analysis workbook to use in updating the values used in WA for each program year.

Fuel Cost Methodology

Fuel Type	Value	Data Source(s)
Natural Gas	7-year winter average 5 past and 2 future years HDD weighted	EIA – East North Central Sort Term Outlook WI - PSC fuel costs KISW – Wisconsin Rapids weather station
Propane (LP Gas)	Past 5-year winter average	WI- PSC fuel costs
Fuel Oil	Past 5-year winter average	WI- PSC fuel costs
Electricity	Past year annual cost	WI- PSC fuel costs
Kerosene	Market value	Internet search
Wood	Market value	Internet search
Other (Wood Pellets)	Market value	Internet search
Coal	No Changes	Market if needed

Price Indices Methodology

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The EIA Annual Energy Outlook publication is used to look at East North Central future fuel price to calculate the annual indices. These values are compared to the most recent release of the Energy Price Indices and Discount Factors for Life-Cycle Cost Analysis –Annual Supplement to NIST Handbook 135. Price indices will be affected by the update of the required discount rate of 2% from 3% and if not available from NIST for 2024, the following methodology will be used.

Annual Updates Procedures

1. Create new copy of Fuel Price Analysis
2. Download and update current monthly values of *KISW_HDD_65*
3. Download and update *FY20YY EIA Raw NG Chart* with current and future monthly values.
Obtain East North Central data from:

https://www.eia.gov/outlooks/steo/data/browser/#/?v=16&f=M&s=0&start=200912&end=201812&ctype=linechart&motype=0&linechart=NGRCU_ENC&map=

4. Download and update *FY20YY “Year Zero” Fuel Costs* with previous winter data from WI PSC. [PSC State Heating Oil and Propane Program \(wi.gov\)](https://www.wisconsin.gov/PSC/State%20Heating%20Oil%20and%20Propane%20Program)
5. Update *FY20YY EIA Raw Annual Data* worksheet with current annual values. Obtain East North Central data from Annual Energy Outlook Table 3:

<https://www.eia.gov/outlooks/aeo/data/browser>

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.

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IV.5 Policy Advisory Council

Policy Advisory Council Members

Bradley Rose	Public Service Commission	bradley.rose@wisconsin.gov
Daliska Smith	Social Development Commission	dsmith@cr-sdc.org
Eric Schrader	WEC Energy Group	eric.schrader@peoplesgasdelivery.com
Gary France	France Propane Service, Inc.	gary@francepropane.com
Jamie Her	Aging and Disability Resource Center of Dane County	Her.Jamie@countyofdane.com
Jason VanderVelden	Advocap, Inc.	jason.vandervelden@advocap.org
Jennifer Fischer	ADRC of Dane Co	fischer@countyofdane.com
Karin Kirchmeier	Partners for Community Development	karin@partners4cd.com
Maricela Gaona	Milwaukee County Dept of Health and Human Services	maricela.gaona@milwaukeecountywi.gov
Mitch Lederman	Madison Gas and Electric	mlederman@mge.com
Molly Calderon	UMOS	molly.calderon@umos.org
Nora Lindgren	Xcel Energy	nora.c.proctor@xcelenergy.com
Rose Strege	Stockbridge Munsee Tribe	Rose.Strege@mohican-nsn.gov
Sarah Schroeder	Employment Resources, Inc.	schroeder@eri-wi.org
Tim Heinrich	Municipal Electric Utilities of Wisconsin	theinrich@meuw.org
Timothy Bruer	Energy Services, Inc.	tbruer@eswi.com
Todd Stuart	Wisconsin Industrial Energy Group	tstuart@wieg.org
Tom Content	Citizens Utility Board of Wisconsin	content@cubwi.org
Tom Mayne	Couleecap, Inc.	tom.mayne@couleecap.org
Veronica Stober	Alliant Energy	veronicastober@alliantenergy.com

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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 03, 2024, to obtain approval of the plan. Meeting minutes are included as Attachment 1.

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, 2024
10:00 AM
Join by phone
Madison: 1(608) 571-2209
Phone Conference ID: 454 286 439#

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) 2024 Department of Energy (DOE), Weatherization Assistance Program Annual Plan and Master File.

Verbal testimony will be accepted telephonically on the draft DOE PY 2024 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.

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Racine/Kenosha CAA
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 10:00 AM, Wednesday, April 3, 2024, (608) 571-2209, Phone Conference ID: 454 286 439#

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, Wednesday, April 3, 2024. 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 2024 DOE WAP Annual Plan and Draft PY 2024 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; Phone: (608) 266-2758

IV.7 Miscellaneous

Recipient Business Officer and Recipient Principal Investigator

	<i>Business Officer</i>	<i>Principal Investigator</i>
Name	Jeff Heino	Kris Haskin
E-mail Address	jeff.heino@wisconsin.gov	Kristine.Haskin@wisconsin.gov
Phone Number	608-264-8801	608-266-2793

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

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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].

The Social Development Commission (SDC) has not been selected as a weatherization provider for PY 24. Due to serious cash flow and fiscal compliance issues resulting in the layoffs of all weatherization staff, it has become necessary to select another provider. 10 CFR 440.14 (b)(6)(i) and (ii), requires an analysis and explanation of the method used to select the new subgrantee to service the former SDC territory. SDC was one of three providers serving the city of Milwaukee. The Division is proposing that this service territory be divided equally between the two remaining providers, La Casa De Esperanza and Partners for Community Development. Both subgrantees already meet the criteria set forth in 10 CFR 440.15 (a)(1) and (2) (i)(ii)(iii) with consideration given to the experience and performance of weatherization or housing renovation activities; the subgrantee's experience in assisting low-income persons in the area to be served, and the subgrantee's capacity to undertake a timely and effective weatherization program.

It is Wisconsin's intent to allocate either Bipartisan Infrastructure Legislation (BIL) funding OR DOE Formula funding received under this plan to the network. Current BIL production is 1,247 units as of the last approved Quarterly Performance Report, 12/31/23. 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 allows agencies to demonstrate success in spending and production for both fund sources and allows compliance with the DOE directive prohibiting the comingling of BIL and DOE formula for the same activities. From a total funding standpoint, each subgrantee received an increase in funding over their base funding from last year. Wisconsin is aware and has taken care to address any funding disparity in the allocation process.

Subgrantees have been provided with opportunities to speak and address any funding concerns directly to the Division. This concept was well received by the network and has been successful in regard to production and expenditure goals. No comments in opposition were received at the 2023 public hearing and Wisconsin's Policy Advisory Committee was also supportive of this approach.

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One of the reasons Wisconsin is continuing with this approach in PY 24 is to allow agencies to remain successful without the added burden of “ramping up.” The Division’s approach mitigated the need for large scale agency ramp up and the associated “ramping down” (i.e. laying off staff) once BIL is no longer available. Given the workforce and supply chain challenges that still persist throughout the entire national WAP network, Wisconsin believes that this approach continues to provide the greatest opportunity for success. Adjustments to this methodology will be made on a year-to-year basis based on agency performance. No changes will be made to PY 2024.

The Division estimates that by March 2025 the balance total allocation (50%) will be requested based on DOE requirements to request the remaining 50% BIL funding.

The framework for the funding structure is as follows:

- PY 24 Formula to be allocated to three subgrantees
- BIL Funds to be allocated to the other 14 subgrantees
- WRF to be allocated to all 17 subgrantees

Wisconsin will continue to evaluate this funding structure and adjust as necessary in future allocations.

Wisconsin will continue its longstanding practice of braiding LIHEAP and Public Benefit dollars. Under this structure, customer access to weatherization services will not be negatively impacted and with the additional funding to each agency, access will be increased.

As requested in the DOE Application instructions, WRF is documented in the Master plan under the Deferral Section, V.1.2 box 5. The limit is \$6,000/unit unless a waiver approval is granted. Consideration is given to homes that have highly cost effective energy conservation measures.

Various reports have been developed within the Home Energy Plus data management system to track expenditures per subgrantee and type of repair completed. Additional details can be found in the Master File.