

**U.S. Department of Energy**  
Weatherization Assistance Program (WAP)  
STATE PLAN / MASTER FILE WORKSHEET

**Grant Number:** New Grant,      **State:** WI,      **Program Year:** 2025

**V.1 Eligibility**

**V.1.1 Approach to Determining Client Eligibility**

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

Owners and renters with income levels up to 60% of the State Median Income, or those who are at or below the 200% FPL, whichever is greater, may receive services. Priority is given to households with children under 6, elderly or disabled members, and households with a high energy burden.

*Describe what household eligibility basis will be used in the Program*

Wisconsin adopted for its Weatherization Assistance Program (WAP) eligibility; the same guidelines used statewide in the Low Income Home Energy Assistance Program (LIHEAP). A household is eligible for weatherization services when the Wisconsin Department of Administration, Division of Energy, Housing and Community Resources (DEHCR or 'Division') has certified the household to be eligible for LIHEAP, based on the following criteria from 10 CFR Part 440.22:

- (a) A dwelling unit shall be eligible for weatherization assistance under this part if it is occupied by a family unit:
  - (1) With an income at or below 200 percent of the poverty level determined in accordance with criteria established by the Director of the Office of Management and Budget.
  - (2) Which contains a member who has received cash assistance payments under Title IV or XVI of the Social Security Act or applicable State or local law at any time during the 12 month period preceding the determination of eligibility for weatherization assistance; or
  - (3) If the State elects, is eligible for assistance under the Low Income Home Energy Assistance Act of 1981, provided that such basis is at least 200 percent of the poverty level determined in accordance with criteria established by the Director of the Office of Management and Budget.
  - (4) Per Weatherization Program Notice (WPN) 22-5, WI WAP's categorical income eligibility may consider using U.S. Department of Housing and Urban Development's (HUD) means test. This may be considered only if a household does not qualify under all other household eligibility criteria.
  - (5) Per WAP Memo 99, income qualified USDA assisted housing may be eligible recipients of WAP funds. The rule does not, however, require Grantees or local WAP service providers to set aside WAP funds for these properties. The Grantee and/or the local service provider retain the authority to set priorities for the use of WAP funds in their service areas, and WI will continue this practice. Funding for individual projects remains a function of Grantee or

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local program priorities and funding availability. Multifamily buildings with 5 units or more are not weatherized with DOE funds in Wisconsin, so the availability of eligible units using USDA Customer Eligibility is very limited.

### **Income Verification**

Wisconsin has a combined LIHEAP and WAP application intake process that provides all the applications for weatherization subgrantees. The Wisconsin Home Energy Assistance Program (WHEAP) income limit equaling 60% of State Median Income (SMI) is used to provide consistency of service and allow shared systems and programming for data collection, entry, and reporting. If a household is over 60% State Median Income (SMI) and is ineligible for Energy Assistance but below 200% Federal Poverty Level (FPL), then they are eligible for Weatherization Services and referred to a subgrantee. Households with income levels up to 60% of the State Median Income, or those who are at or below the 200% FPL, whichever is greater, may receive weatherization services. The Division has established written policies, incorporated in the Weatherization Program Manual, which set forth procedures to determine dwelling unit priority [440.16]. Written policies cover income eligibility, determination of rental property eligibility, and assurance of tenant benefit from weatherization services. An energy audit must be completed within 12 months from the certification date, or the eligibility of the household needs to be reestablished by reapplying for WHEAP. Wisconsin complies with all household and building eligibility criteria outlined in 10 CFR 440.22.

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

Noncitizen applicants to the LIHEAP program in Wisconsin are determined to be either eligible noncitizens or ineligible noncitizens. Citizenship and Immigration Services (USCIS). Only Eligible Noncitizens are eligible for LIHEAP and the Wisconsin Weatherization Assistance Program.

To be defined as an Eligible Noncitizen, an individual must have a valid Social Security Number (SSN) issued by the Social Security Administration, which passes the verification system in the Home Energy Plus (HE+) System. The HE+ System verifies the SSN of all household members through the Social Security Administration using the Master Customer Index database administered by the State of Wisconsin Department of Health Services. In addition to a valid SSN, the individual's lawful status must be one of the eligible statuses listed in the WHEAP Operations Manual, Section 2.2.4 Student Status and WHEAP Eligibility. Applicants are required to provide unexpired documentation which validates their lawful status in the United States.

Individuals who do not have a valid SSN and/or immigration status are marked as Ineligible Non-citizens and are not eligible for either program.

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### V.1.2 Approach to Determining Building Eligibility

#### *Procedures to determine that units weatherized have eligibility documentation*

The Division has established written policies, incorporated in the Weatherization Program Manual, which set forth procedures such as verifying ownership, denying, or deferring services, and using Weatherization Assistant, to determine building eligibility.

The combined LIHEAP and WAP application intake process provides all the applications for weatherization subgrantees, applying the client eligibility guidelines as described in Section V.1.1. Beginning in PY 2024, HUD and USDA categorical eligibility are additional methods of determining client eligibility and will be included in State Policy in the upcoming program year.

To be eligible for weatherization, both the building and the household(s) residing in the building unit(s) must meet HE+ program eligibility criteria. Household eligibility is established by a WHEAP provider through a completed HE+ Energy Assistance application. At the time an applicant's HE+ application is approved, the address reported on the HE+ application is referred for Weatherization services. Referrals for Weatherization services extend for 12 months following the date of the approved HE+ application. If an HE+ eligible household moves, the Weatherization referral does not automatically carry to the new address. The household may apply during the same year to determine eligibility for Weatherization assistance at the new address by completing an HE+ application. All applications must contain current, complete, and accurate information based on the date of the application.

There are two eligibility stages, and both are contingent upon the household remaining at the address for which the initial eligibility was established.

**Stage 1:** The household is eligible for weatherization services for one year from the WHEAP application date, contingent upon building eligibility. During this one year time period, an energy audit shall be completed or the eligibility of the household for weatherization shall be established by applying for WHEAP.

**Stage 2:** The completed energy audit date is the start of the Stage 2 time period. The unit shall be reported as completed within one year of this date. If a building is vacated while work is in progress during Stage 2, the Agency may contact the HE+ Help Desk for guidance on expensing and reporting incomplete units.

When **DOE** funds are used:

1. 66 percent or more (50 percent or more for duplexes and 4-unit buildings) of the units in the building must be occupied by eligible households; or
2. 66 percent or more of the units will be occupied by eligible households within 180 days under a federal, state, or local government program for rehabilitating the building or

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making similar improvements to the building. The Agency shall receive approval from the Division prior to utilizing this qualification process.

All units required to meet the percentage amounts above shall be eligible before the energy audit is completed or the eligibility of the household shall be re-established by applying for WHEAP. If the multi-unit building is not eligible for weatherization, service to the entire building shall be denied.

*Describe Reweathering compliance*

**Grantees must include the specific process for tracking homes previously weatherized. This process must now be expanded to include all Federal programs providing “weatherization” activities. The inclusion of “other Federal programs” includes all Federal funds including LIHEAP, HUD, or USDA “weatherization” activities.**

The Division uses the HE+ WisWAP data system to track weatherization completion dates by address for DOE and LIHEAP for “weatherization” activities. The ability to re-weatherize a home will be determined by the data available in the HE+ system. The Home Energy Plus system has updated the functionality of re-weatherization. A building is eligible for re-weatherization if a current year HE+ application deems the household income eligible. Adding a re-weatherization cycle will be allowed on Buildings where the Job Completion Date is on or before 7/1/2010 for DOE funding. The “Add Re-Wx Cycle” ribbon action will be enabled (green) in the system. The ribbon action will be disabled (red) for a Job Completion Date after 7/1/2010.

- Using any funds source, including DOE funds, if the building was “weatherized” prior to the completion of the full 15 years (16th year).

Units previously weatherized may receive any additional measures as determined by an energy audit. A Completed Unit has received all appropriate weatherization measures required by the energy audit and meets the following criteria: the building has passed a final inspection; the property owner, or the owner’s authorized agent, has completed the owner sign-off document, or a good faith effort has been made to obtain the sign-off; and a completion date is entered on the associated HE+ System/WisWAP job.

Otherwise, a unit may only be re-weatherized if such dwelling unit has been damaged by fire, flood, or an act of nature and repair of the damage to weatherization materials is not paid for by insurance, per 440(18)(2)(ii). Also see V.9 Energy Crisis and Disaster Plan.

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*Describe what structures are eligible for weatherization*

To be considered for weatherization, a dwelling must be a structure, including a stationary mobile home, apartment, group of rooms, or a single room occupied as separate living quarters (including historic properties), and qualified shelters or other group facilities. Government institutions, halfway houses, nursing homes, recreational vehicles (RVs), cars, trucks or tents are not eligible dwellings for weatherization services. Properties having only commercial use are not eligible for weatherization. Properties fifty years old or older must be reviewed for possible historic status or features and shall be weatherized only in such a way as complies with the State Historic Preservation Officer (SHPO) Programmatic Agreement (PA). Weatherization of a dwelling unit which is designated for acquisition or clearance by a Federal, State, or local program within 12 months from the completion date of weatherization is not allowed.

Per WAP Memo 110, PAs do not cover work on Tribal land. As a result, any proposed work on Tribal land utilizing DOE funds will require prior review and approval from DOE in buildings 45 years or older on Tribal Lands.

*Describe how Rental Units/Multifamily Buildings will be addressed*

Wisconsin has an extensive policy regarding the weatherization of rental property, including procedures to document that the tenant receives the benefits of weatherization [440.22(b)]. Owners of rental buildings containing two or more units may be required to contribute to the cost of weatherization [440.22(d)]. Language from the Wisconsin Weatherization Program Manual addresses the DOE requirements regarding limits on rent increases and undue enhancement. Renters are notified of the stipulations on rent increases.

Rental property owners must provide signature approval of work to be performed on a standardized Rental Work Agreement prior to commencement of work. As part of the rental agreement, landlords must agree to repayment of weatherization service for violations of the agreement if the job is stopped while in process. The final inspection is the last step of the weatherization job and follows the completion of all on-site work. A sign-off by the Owner or his/her Authorized Agent is required at the conclusion of the final inspection to verify that weatherization was completed in an acceptable manner.

When DOE funds are used to weatherize multi-unit buildings, Wisconsin requires that 66 percent or more (50 percent for 2 and 4 unit buildings) of the dwelling units in the building are occupied by eligible applicants. Multi-family buildings that have 25 or more units are considered on a case-by-case basis and completion is managed by the local subgrantee with extensive oversight by the Division to ensure work completed meets all applicable federal requirements. Leveraged funds are used to weatherize multifamily buildings. Wisconsin does not plan to seek DOE approval for buildings that have 5 or more units.

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*Describe the deferral Process*

Wisconsin has a detailed policy and clear procedures for subgrantees to follow when deferral is necessary. Subgrantees are required to provide written notification of deferral within five working days upon decision to defer services and provide a reasonable timeframe for applicants to address the cause of the deferral. Reasons for deferral include structural or other issues that would limit the effectiveness or reduce the lifetime of measures. There are also health and safety reasons that may warrant deferral of a unit. Additional information on deferrals is found in the Health and Safety Plan (Attachment 9).

The following is documented in the Weatherization Policy Manual Section 3.6 and 3.6.1

**Weatherization services shall be deferred when:**

- The customer refuses to take major measures that cause the proposed cumulative Savings to Investment Ratio (SIR) to drop below 1.0 for units with DOE funding.
- Occupant Preexisting Health Conditions: Agencies shall notify the customer that occupants with preexisting health conditions may be adversely affected by installed weatherization materials or measures. If an occupant may be sensitive to certain weatherization materials or measures. The Agency shall devise ways of installing materials to reduce exposure to the occupants so that weatherization work may be performed safely. Possible approaches may include temporary containment areas, HEPA filtered equipment, temporary removal or relocation of occupants that may be adversely affected, or alternative installation methods or materials that meet the specifications of the weatherization program.
- A single repair measure exceeds \$1000. Agencies shall then defer all services to the customer until the repair issue is addressed with other funds.
- Repair measures cause the proposed cumulative SIR to drop below 1.0 for DOE funded units. Agencies shall then defer all services to the customer until the repair issue is addressed with other funds.
- A manager, or designee, shall review health and safety costs \$5,000 or greater per unit indicate that an excessive proportion of the work to be completed is not expected to generate energy savings,
- The building condition or occupants presents a serious crew safety concern.
- There are no energy conservation measures to complete and/or the cumulative SIR is less than 1.0.
- There are changes to household eligibility status.
- The building is listed for sale, in foreclosure proceedings, or is foreclosed.

Pictures documenting the reason for deferral shall be part of the customer file record and uploaded to the HE+ System/WisWAP. Agencies shall create a building in Home Energy

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Plus System/WisWAP reporting system, document the deferral status, and select the reason(s) for deferral. As shown in Table below, most deferral reasons require a notification letter to be sent to the customer funds to address the reason for deferral. When planning to use Readiness Repair funds, mark the building as deferred.

Special conditions apply to asbestos deferrals and corrective action taken by the customer (WPN 22-7). See the Attachment 9, Health and Safety Plan for additional information.

***Deferral Reasons and Notification Letters***

Building is For Sale or in Foreclosure - Yes
Chemical or Combustion Hazard - Yes
Clutter/Restricted Access to Work Areas - Yes
Lead Paint Hazard - Yes
Moisture/Mold - Yes
Possible Asbestos Containing Material - Yes
Refused/Unable to Pay Contribution - No
Remodeling - Yes
Repair - Yes
Sewage/Animal Feces - Yes
SIR <1.0 - Yes
Vermin/Pest - Yes

**Deferral Notification Requirements**

Upon making the decision to defer weatherization program services, the customer shall be notified in writing within five working days based on the Table above. The notification shall be sent by mail or hand delivered. Agencies shall continue to make appropriate referrals to any programs available to assist customers in resolving the deferral issue(s).

The Deferral of Service Notification letter template is available in the HE+ System/WisWAP. Agencies are to customize the letter to the applicant. A copy of the Agency's appeal procedure is included with the notification.

The notice shall include the reason for the deferral, and the means by which the customer can rectify the situation so the weatherization measures can be installed. The requirements for rectifying the deferral shall be reasonable and appropriate to the severity of the situation being addressed. The Agency shall provide the customer with a reasonable timeframe to correct the identified issue.

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Any eligible customer that complies fully with these requirements shall be reinstated in the Agency’s work system so weatherization work can progress as soon as reasonably possible. There is no time extension for the eligibility period due to a deferral. If the unit cannot be reported as complete within the eligibility period, the customer must reapply for WHEAP, and they do not retain their priority.

Additional Information can be found in Attachment 9, Health and Safety Plan, and the Deferral Notification Template that is customized by the subgrantee and sent to the household (Attachment 20).

**Wisconsin Weatherization Readiness Funds**

Wisconsin will use the DOE Weatherization Readiness Fund (Readiness) to address necessary repairs in 1-4 site built units (that have been deferred from receiving weatherization services. Funds will be allocated consistent with the T&TA formula for distribution to the subgrantee network. Readiness repair services are tracked in the Home Energy Plus (HE+) data system. The System tracks budget and repair activities within the same grant award.

**DISTRIBUTION OF FUNDS:** Wisconsin was allocated \$1,033,524 amount of which will be divided between the subgrantee for use across Wisconsin in conjunction with Formula and DOE Infrastructure Investment and Jobs Act (IIJA) weatherization jobs.

<b>Grantee</b>	<b>Readiness</b>
ADVOCAP, INC.	45,979
Ashland County Housing Authority	47,389
Rock/Walworth Comm. Action	44,388
CAP Services, Inc	36,733
Central Wisconsin CAC, INC	35,748
Partners for Comm Dev Inc	169,416
Hartford Comm Development Authority	19,574
La Casa de Esperanza	183,149
NEWCAP, Inc.	74,568
North Central CAP, Inc.	80,891
Outagamie County Hsg Auth	26,619
Project Home	37,980
Racine/Kenosha CAA	71,647
Southwestern Wisconsin CAP	19,668
West Central Wisconsin CAP	59,717
Western Dairyland EOC	40,602
CouleeCAP	39,456
<b>TOTAL</b>	<b>\$1,033,524</b>

**MAXIMUM COST PER UNIT:** The maximum cost per unit for DOE Readiness funds will be \$6,000. **However,** higher amounts will be allowed with prior Division approval. This is

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separate from the weatherization and Health & Safety measures and not included in the Average Cost Per Unit (ACPU).

**BRAIDING FUNDS:** Whenever possible and appropriate, Wisconsin will work to braid WRF with LIHEAP and Public Benefits funding.

**MONITORING OF UNITS:** Agencies will inspect all units receiving Readiness funding and the Division, or designated vendor, will inspect a minimum of 5%, consistent with our established monitoring protocol.

**REPORTING:** Deferred jobs and jobs that come out of deferral are tracked in our data system and units that receive Readiness will be captured by a specific code and funding sources. Reporting to DOE will take place as required.

**REPORTING CATEGORIES:**

Customers will be qualified through the data system and are incorporated into our regular tracking: The following items are currently tracked and will continue to be tracked:

- . Client #
- . Address Location
- . Client Ranking
- . Housing type
- . Year built (if available)
- . Specific repairs
- . Date of Application
- . Deferral notification to client
- . Date of Remediation
- . Cost of Remediation

**ELIGIBLE MEASURES: NATURE OF REPAIRS NEEDED WHICH PROHIBIT WEATHERIZATION.**

Where applicable, multiple repairs or remediation reasons for a single building may be addressed.

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<b>Reason Deferred</b>
Chemical or Combustion Hazard
Clutter/Restricted Access to Work Area
Lead Paint Hazard
Moisture/Mold
Possible Asbestos Containing Material
Repair: Roof, Ceiling, Walls, Floor, Foundation, Plumbing, Electrical, Exterior drainage
Sewage/Animal Feces
Vermin/Pests

All households must be determined to be Home Energy Plus eligible for the program year 2025 prior to the time of work being completed. Agencies may review their deferral lists and consider homes that have been deferred in the past if the household has an eligible application. Program income eligibility (new HE+ WHEAP application) may need to be verified again, depending on the last date of eligibility (Stage 1). A new HE+ Energy Assistance application and energy audit may need to be conducted if the one year window has lapsed (Stage 2).

Repairs may include, but are not limited to, electrical upgrades, replacement of knob-and-tube wiring, plumbing repair, removal of pests or clutter, correcting moisture or standing water issues (including installation of gutters/downspouts), ceiling, roof repair and roof sheathing (structural skin of the roof system) and sheathing weather exposure protection, (not a full roof structure replacement). Tuck under garages, or pressure boundary repair.

1. Reporting and tracking will be completed using Weatherization Assistant and the HE+ System/WisWAP. Repairs will be modeled into Weatherization Assistant using the Readiness repair code(s) (ZZ codes) in HE+ reporting system.
2. All repair and weatherization work shall be completed within the Stage 2 time period.
3. Agencies shall follow the same customer eligibility requirements, reporting, Standard Work Specifications, contractual obligations, insurance, lead and asbestos safe work and required certifications for workers, and operational directives, including procurement standards that are in place for Wisconsin WAP.
4. All work performed shall meet any local building codes and obtain any municipality required permits as applicable. Materials and appliances shall be installed to meet Product Manufacturer Instructions (PMI).

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5. HE+ System/WisWAP documentation shall include before and after photos, list of work
6. and measures completed, job estimates (bids) and actual expense bills (invoices) for labor/materials/permits.
7. DOE Readiness Funds may be used to address unforeseen repairs on eligible in progress jobs. If the added cost under basic repairs (ZR code) drops the cumulative SIR < 1, the Weatherization Readiness Funds can be used. The Agency shall rerun the WA audit and enter itemized costs for those selected Readiness repairs with the ZZ code category using Readiness funds as a funding source. The audit will then be imported into HE+ System/WisWAP.
8. Work orders and the customer work agreement shall detail work specifications for any Readiness repair measures completed using the readiness funding ZZ codes.
9. Agency weatherization and licensed professional staff may complete the repairs. Agencies that do not have licensed professionals will procure those services as required by code.

**PROCESS:** DOE Weatherization Readiness Funds can only be used in homes that will contain at least one DOE measure and will be DOE eligible following the deferral correction:

1. In most cases deferrals are identified at the time of the assessment when someone goes to the home. For a new client that is being assessed for Weatherization services, if there are serious issues identified that are beyond the scope of eligible conservation and H&S recommendations utilizing the funds available, this home would be categorized as Deferred until the deficiency is corrected. These clients have been identified following the normal prioritization and wait list process so this should continue to be followed.
2. Subgrantees that have a wait list of deferred homes in the service area should consider immediately the potential for Weatherization Readiness funds to get them in the queue for weatherization services. Clients should be contacted and scheduled for assessment at the earliest opportunity.
3. The subgrantee shall create a scope, contract for services, or engage with a crew to do the work so that the building would then be eligible for weatherization work. Readiness work needs to utilize Weatherization Readiness Fund repair measure (ZZ Repair codes) in the client file.
4. When the Readiness work is complete, the client will sign off on a list of the repairs completed and then weatherization services should be scheduled as soon as possible.
5. Client files for each job are expected to contain the intake, measure, cost, and inspection information for Readiness.
6. Repair completed using these readiness funds shall correct the issue(s) of deferral

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7. and allow weatherization services to proceed. Agencies shall evaluate the energy savings potential in the use of these funds.
8. Repairs using the DOE Readiness Funds ZZ repair code are limited to one to four units and do not apply to mobile homes.
9. Readiness funds shall not be used for housing rehabilitation, restoration, remodeling, building additions, accessibility improvements, or enlarging the pressure boundary. These funds will not address all the reasons for deferral and buildings may still need to be deferred if they exceed the scope and policy of the funding.
10. Readiness repairs must be completed within a reasonable period of time. Stage 2 eligibility time frame of 1 year after audit. Any timeframe after 6 months eligibility is reconfirmed.

**V.1.3 Definition of Children**

Definition of children (below age): 6

**V.1.4 Approach to Tribal Organizations**

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

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

The Division's weatherization provider network provides weatherization services to eligible Native American households both on and off reservations [440.16 (f)]. Where a Tribal household is in alignment with the DOE priority definition, the Tribal referrals shall be given priority for service by weatherization subgrantees. Off reservation households of Native Americans will be served by local subgrantees in that service area according to the same prioritization as non-Native households.

**V.2 Selection of Areas to Be Served**

Weatherization services are provided on a statewide basis. Funding allocations among the subgrantees [440.15(b)] are made according to a population weighted degree-day formula, shown below, which complies with the requirement to allocate based on relative need. The formula is used to determine overall agency funding except for Training and Technical Assistance (T&TA). Any additional DOE funds received during the year will be allocated to local subgrantees according to the same formula. The allocation formula is:

$CDD \times CPH \times 100 = \text{County allocation SCDDH percentage where:}$

- . CDD is the average county degree days

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- CPH is the county persons eligible for Low Income Home Energy Assistance (LIHEAP)
- SCDDH is the sum of the county degree days multiplied by LIHEAP eligible households

The three agencies selected for formula funding are of sufficient size to absorb this level of funding and have demonstrated a history of success in expending DOE funding and meeting their unit goals. These agencies have also historically been able to accept additional DOE funding through reallocation from other agencies.

### **v.3 Priorities**

The State of Wisconsin requires subgrantees to prioritize weatherization services to the elderly, disabled persons, households with children under six years old and households with a high energy burden [440.16(b)]. Eligible households are assigned a priority identification number and added to a referral list maintained by the Division. The priority identification number is generated based on factors including the household energy burden, and whether the household includes members that are elderly, disabled, or under six years old. The referral list is updated weekly and available to subgrantees electronically. Subgrantees select referrals from the list based on priority identification number and actual energy use data (when available).

Referrals are prioritized by energy burden and additionally by vulnerable household members. A list of potential weatherization households prioritized based on the following formula: (Sum of WHEAP heating and electric benefit amounts) + (Sum of DOE priority household categories). The State of Wisconsin recognizes energy use and energy burden when establishing priority for service.

### **v.4 Climatic Condition**

The Köppen climate classifications for Wisconsin are Dfb and Dfa, denoting a humid continental climate with cold winters and warm (northern) to hot (southern) summers. Bordering Wisconsin are two Great Lakes, Superior along the north and Michigan along the east, both of which have major influences on the overall climate. Windy conditions are frequent with average speeds falling between 5-18 mph 75% of the time and are also influenced by the Great Lakes. The coldest winds come from the northwest in the winter and many homes limit the number of windows facing this direction. Seasonal temperatures range from average lows of 0°F to 10°F in winter to average highs of 75°F to 85°F in the summer. Extreme cold temperatures in the north have been measured at -30°F and colder. Extreme summer temperatures in the south can reach 100°F or hotter. Dehumidification is equally important as cooling during summer months with average relative humidity levels of up to 90% in morning and 65% in afternoons. Although heating dominates the energy needs for Wisconsin homes, weatherization measures have an impact on the smaller cooling loads seen in most of the state, especially in the southeast area of the state.

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The wide variance of climatic conditions is addressed by the Wisconsin weatherization program by utilizing heating degree days (HDD) for energy savings to normalize annual energy consumption and weather factors for calculating minimum ventilation rates for acceptable indoor air quality. Hourly HDD data is collected monthly from the National Oceanic and Atmospheric Administration (NOAA) for twenty-four Wisconsin weather stations and is used to normalize consumption to typical or average annual HDD for each station. Subgrantee energy auditors are instructed to use the weather station closest to the building unit address.

**Wisconsin Normal Heating Degree Days**

**Fifteen Year Average by Weather Station, 2010 – 2024**

City	HDD	City	HDD	City	HDD	City	HDD
Antigo	8697	Ironwood	8609	Marinette	7647	Rhineland	8504
Appleton	7306	Janesville	6337	Marshfield	7791	Rice Lake	8045
Ashland	8492	La Crosse	6740	Milwaukee	6340	Sturgeon Bay	7418
Eau Claire	7595	Lone Rock	6789	Mosinee	8039	Watertown	6996
Green Bay	7181	Madison	6796	Oshkosh	7074	Wausau	7784
Iron Mountain	8255	Manitowoc	7301	Phillips	8531	Woodruff	8313

**V.5 Type of Weatherization Work to Be Done**

**V.5.1 Technical Guides and Materials**

*Subgrantees shall, in a satisfactory manner, perform program activities according to the "Weatherization Assistance for Low Income Persons Program" regulations pursuant to Part A, U.S.C. 6861-6872 of Title IV of the Energy Conservation and Production Act, Pub. L94-385, 90 Stat. Et. Seq: Title 10, Chapter 2, Part 440 (published in the Federal Register), Friday, December 8, 2000, Vol. 65 No. 237.*

Wisconsin uses the Wisconsin Weatherization Program Manual and the Wisconsin Weatherization Field Guide to pass along to its subgrantees policies and procedures to be followed. These documents and additional information are located on the Division's Home Energy Plus website at <https://energyandhousing.wi.gov/Pages/Home.aspx>. The Division also issues periodic policy updates and other guidance through Informational Transmittals to subgrantees.

A balanced combination of energy conservation techniques will be utilized in compliance with DOE regulations [440.14(c)(3)]. Since July 1, 2012, major measures have been selected by a computerized energy audit which has been approved by DOE. Typical work includes instrumented air sealing, attic and sidewall insulation, refrigerator replacement, electric

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water heater conversion, furnace replacements when necessary, and lighting replacement with Energy Star® qualified LED light bulbs (approved 6/12/2018). Spray foam insulation and increased lifetimes were approved as part of the 3/2/2021 supplemental energy audit approval. WI's 2018-2023 energy audit renewal reveals that sufficient supporting documentation was received to approve its (spray foam (2-part)) use at that time. DOE/SMS was to add spray foam as insulation to WI's updated energy audit approval.

Allowable expenditures are established to meet the requirements of 10 CFR Part 440.18. All work is performed according to DOE approved energy audit procedures and the Standard Work Specifications (SWS) outlined in [WPN 22-4, Section 1](#). All materials and specifications are met by the standards set forth in 10 CFR 440, Appendix A. All Subgrantee agreements and vendor contracts will contain language which clearly documents the SWS specifications for work quality.

#### **WPN 22-4, Sec on 1: Definition of Work Quality Guidelines and Standards**

All measures and incidental repairs performed on customer homes must meet the specifications provided in the Weatherization Program Manual and Weatherization Field Guide. The current versions of these guidance documents are available on the Home Energy Plus website: <https://energyandhousing.wi.gov/Pages/AgencyResources/weatherization.aspx>

Wisconsin reviewed and revised the Weatherization Field Guide to ensure all standards meet or exceed the minimum standards in the relevant SWS requirements as required by WPN 22-4 Section 1.

The Field Guide received approval from DOE in March 2024 until June 18, 2028, to comply with the appropriate SWS for each procedure. Wisconsin's Request for Bid templates include a requirement that subgrantees ensure contractor agreements are tied to program requirements contained in technical guides and materials. The sump pit approved waiver is included in the Health and Safety Plan Attachment 9.

DOE funds are not used for mobile homes. MH references are made throughout the Field Guide as they pertain to Mobile Homes. The Field Guide will be submitted to DOE in PY 25 (SFY 26) followed by a reapproval every five years, unless changes require earlier revision.

#### **WPN 22-4 Section 1: Communication of Guidelines and Standards**

All subgrantee agreements and contracts contain language which requires that work performed meets the technical specifications for field work provided in the Weatherization Program Manual and Weatherization Field Guide. The Grantee contract requires subgrantees install allowable

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weatherization measures per the Wisconsin Weatherization Program Manual, and federal and state regulations (Article 5. Scope of Work). All work is being performed in accordance with DOE approved audit procedures (see V.4.2 below) and 10 CFR 440 Appendix A.

*Grantees must provide language to be included in Subgrantee contracts that outline the expectations for work quality and instructs the Subgrantee to include these expectations in any contracts entered into with contractors and vendors.*

The following statement is included in the subgrantee contract:

“The Sub-grantee shall supply or provide all necessary personnel, equipment, materials and supplies, to install allowable weatherization and energy conservation measures in eligible low income households per the Wisconsin Weatherization Assistance Program Manual, the Home Energy Plus Furnace Program Manual, and the Wisconsin Weatherization Field Guide, and in compliance with applicable federal and state regulations as identified in the SWS specifications for work quality outlined in [WPN 22-4, Section 1](#). All work is performed in accordance with the DOE approved energy audit procedures and [10 CFR 440 Appendix A](#)”

The Wisconsin Weatherization Program Manual clarifies that subgrantees are required to identify and provide the applicable technical standards and specifications in every procurement action. In addition, Request for Bid templates used by subgrantees to ensure that contract agreements are tied to program requirements and the related Standard Work Specifications (SWS) is incorporated into program documents. These updates are communicated each year to all subgrantees via e-mail and at in-person network meetings and events. Wisconsin will continue the process of cross walking the Standard Work Specification updates with program documents to prepare for implementation of any necessary changes in Program Year 2026. The next content update to the SWS is SWS v.2025. The Weatherization Operators of Wisconsin, its subcommittee, the Hudson Group, and the Division's Ad Hoc Work Groups will continue to provide input to proposed policy changes.

Updates to the Weatherization Program Manual are made annually and the Weatherization Field Guide as required based on SWS changes. The documents are distributed electronically to all subgrantees via broadcast informational transmittal and published on the Home Energy Plus website on or before July 1. A signature on the weatherization contract will serve as proof of receipt.

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The Division provides follow-up and clarification upon request through our Help Desk (via email and telephone), through broadcast informational transmittal sent to all subgrantees, and at Weatherization Operators of Wisconsin organization meetings. The information transmittals are catalogued and available for subgrantees on the HE Plus T/TA website. The Division also conducts calls with the weatherization subgrantees to address questions or concerns.

**Field guide approval dates**

Single Family: 6/28/23

Manufactured Housing: 6/28/23

Multifamily: N/A

**V.5.2 Energy Audit Procedures**

Audit Procedures and Dates Most Recently Approved by DOE with conditional approval.

Audit Procedure: Single-family

Audit Name: NEAT

Approval Date: 8/3/2028

Audit Procedure: Manufactured Housing

Audit Name: MHEA

Approval Date: 8/3/2028

Wisconsin will continue to use Weatherization Assistant v8.11.0.1 for all energy audits along with customized excel based workbooks to include measures not readily modeled in WA. Wisconsin has started the process of developing a Wisconsin specific audit tool to replace WA.

The estimated timetable is to have the new audit tool ready for submittal to DOE for approval by the start of PY 2028.

The audit tool will meet all requirements of 10 CFR 440 including the development of a web-based database structure for buildings and energy savings modeling algorithms that interact with shell savings and mechanical savings. The audit tool will be Wisconsin specific to provide seamless data integration with all components of the current HE+ System. Please see details regarding the state's DOE's conditional approval in PAGE under Monitoring Assessments.

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Audit Procedures and Dates Most Recently Approved by DOE

Audit Procedure: Single Family

Audit Name: NEAT (WA v 8.11.0.1)

WI customized Excel workbook Approval Date: 8/3/2028

Audit Procedure: Manufactured Housing

Audit Name: MHEA (WA v 8.11.0.1)

Approval Date: 8/3/2028

Leveraged funds are used to weatherize manufactured housing heated with natural gas. Wisconsin only requires the use of MHEA for mobile homes heated with bulk fuels or electricity.

Leveraged funds are used to weatherize multifamily buildings. Wisconsin does not plan to seek DOE approval of our audit protocol for this type of housing.

### **One to Four Unit Buildings**

Wisconsin models all 1-4 unit buildings with NEAT. Each energy conservation measure must have an SIR of at least 1.00 and the total job SIR must also be at least 1.0. The Division has developed uniform, validated NEAT databases (including enabled measures and set-up libraries) for 1 to 4-unit buildings.

Subgrantees are required to use this data and an approved audit protocol to evaluate units and assure that program outcomes conform to DOE requirements. Subgrantees are required to follow the policies and procedures in the Wisconsin Weatherization Program Manual and Wisconsin Weatherization Assistant Guide, which includes detail on the measures that shall and shall not be included in the SIR calculation (see Weatherization Assistant Guide Chapter 4).

Per WPN 23-06, Wisconsin does derate Heating/Cooling System efficiencies following the derating formula: Degraded Efficiency = Base Efficiency \*  $.99^{\text{age}}$  Where:

- Base Efficiency = Labeled efficiency of Pre-Retrofit equipment when new (Seasonal Energy Efficiency Ratio (SEER), Energy Efficiency Ratio (EER), or Heating Seasonal Performance Factor (HSPF))
- Age = Age of equipment in years.

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**Manufactured Housing**

Wisconsin uses MHEA (Version 8.11.0.1) to model manufactured homes if bulk fuel or electricity is the primary space heating fuel. In July 2015 Wisconsin discontinued the use of MHEA for auditing natural gas manufactured homes and began using a measures list program model. The measures list was developed based on extensive analysis of actual energy savings data from Wisconsin's Self Evaluation Savings studies, and a comparison of MHEA estimated costs to actual reported costs for the most recent program year. Only leveraged funds are used to weatherize manufactured homes.

**Multifamily**

Only leveraged funds are used to weatherize multifamily buildings (5-24 units), and Wisconsin does not currently plan to seek DOE approval of our audit protocol for this type of housing. In the event DOE funds would be proposed for weatherizing multifamily buildings in the future, those buildings' energy audit (including data collection forms and ASHRAE calculations) will be submitted to DOE for approval on a building by building basis.

**v.5.3 Final Inspection**

A final inspection is performed by subgrantee staff on every unit prior to reporting the unit as completed [440.16(g)]. Generally, the final inspection will not be performed by the person who did the initial energy audit of a property. In all cases the final inspection is performed by someone other than staff who performed the weatherization work. The Division recommends subgrantees to perform "real-time" final inspections, when possible, a process improvement initiative to have the final inspector onsite on the last day of scheduled crew work. This improves responsiveness and efficiency of program operations by allowing crew workers to immediately address unsatisfactory work. The client satisfaction/Feedback is located on page 2 of the DOE Quality Control Inspection form, Attachment 16.

**WPN 22-4 - Section 2: Inspection and Monitoring of Work Using Guidelines and Standards**

All subgrantee final inspections for job completions reported in PY 2016 and beyond are performed by certified Quality Control Inspectors as outlined in WPN 22-4 Section 2. Wisconsin has implemented a Grantee Developed Quality Control Inspection Policy to ensure compliance with WPN 22-4.

Final inspections shall be completed on every unit. The final inspection shall be performed after the completion of any callbacks and before the owner or authorized agent and final inspector signs off on the Completion Certificate. All final inspections of units completed using DOE funds shall be performed by a certified Quality Control Inspector (QCI).

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The Home Energy Plus DOE QCI Form shall be completed, uploaded to the HE+ System and kept with the customer file for all units where any DOE funds are used. The Final Inspection Form and photos shall be completed for each building and uploaded to the HE+ System/WisWAP.

Whenever feasible, final inspections shall be completed by individuals who did not audit the building. In all cases, the final inspection shall not be completed by an individual involved in the installation of the weatherization measures on the inspected unit.

Wisconsin is fortunate to have enough certified QCI professionals in the subgrantee network so that the certified QCI performing the final inspection does not perform the initial energy audit.

QCI: As of March 2025, Wisconsin has at least 60 QCI certified staff in the Weatherization Assistance Program network: 44 subgrantee staff, 6 Division Staff and 6 employees of State of Wisconsin subcontractor (Slipstream) and 4 program subcontractors that complete final inspections and monitoring visits (See Section V.8.3 Monitoring Activities). The Division's goal is to maintain at least two certified QCI on staff at each subgrantee. QCI training, continuing education unit (CEU) activities, and relevant exam proctoring is being provided by Slipstream (see Section V.8.4 Training and Technical Assistance Approach and Activities), an IREC accredited training provider and BPI Test Center.

The Division will be monitoring certification through the BPI website and certification dates provided by subgrantee staff to validate QCI credentials. Inadequate inspection practices will be identified by either the Division Quality Assurance or Slipstream staff during monitoring visits (see Section V.8.3 Monitoring Activities). Disciplinary actions for inadequate inspection practices will be reviewed on a case-by-case basis. When disciplinary action is warranted, the subgrantee will be required to develop and implement a corrective action plan to address and

*Attachment F of the Subgrantee contract identifies that the Division, "reserves the right to suspend payment of funds if required reports are not provided to the Division on a timely basis, if performance of contracted activities is not evidenced or if Subgrantee is not responding within a reasonable time to issues identified through Quality Assurance visits, Administrative Reviews, or other oversight activities. The Division further reserves the right to suspend payment of funds under this Agreement if there are deficiencies related to the required reports, or if performance of contracted activities is not evidenced on other Contracts between the Division and the Subgrantee in whole or in part.*

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*The Grantee's management and financial capability including, but not limited to, audit results and performance, may be taken into consideration in any or all future determinations by the Division including withholding payment or terminating this Agreement."*

#### **V.6 Weatherization Analysis of Effectiveness**

Quality assurance is the ongoing process of verifying that completed program work meets clear, measurable expected outcomes as established by program standards. Every weatherized unit receives a comprehensive inspection before the owner signs off on the completed work. The Division continually gathers and analyzes data on housing types, frequency of measures installed, costs of installed measures and the direct effect of the installed measures. Much of the data is provided directly by subgrantees in the individual job reports completed in the Wisconsin WAP online reporting database. At least five percent, and up to 10 percent, of completed units are inspected and reviewed in monitoring inspections completed by Division staff and contractors. Using this data, Division Quality Assurance staff select units for monitoring to ensure the onsite monitoring visits provide the best opportunities to review measures that may need improvement at a local level and to review jobs that may have higher measure costs. During the onsite visits, customers are interviewed to verify customers' understanding of completed work and assess their level of satisfaction with the work performed. The data accumulated from these evaluations are used to continually improve training curriculums and to adjust audit protocols, work standards, and procurement specifications.

The Division contracts with Slipstream for independent and objective evaluation of program processes and outcomes. The Quality Control Inspectors complete a comprehensive evaluation of completed energy audit to ensure that modeling of energy savings is accurate, The Self Evaluation Savings (SES) study conducted at least biennially provides critical data on the projected energy and monetary savings of weatherization work performed. Utility bill information from approximately 10,000 households is analyzed in comparison with HE+ data regarding measures installed in thousands of weatherized units. Utility information for income qualified households not yet weatherized is utilized to control for weather and other nonprogram effects. Through this study, the Division can analyze trends in savings over multiple years and compare energy savings and measure costs among the subgrantees. The SES assists in assessing program effectiveness, directing policy decisions, identifying best practices being used at some subgrantees and targeting training and technical assistance resources.

Communication is an essential part of the quality improvement process. The Division participates with subgrantees in a variety of venues including the state association for Community Action Agencies (WISCAP), Weatherization Operators of Wisconsin (WOW), and the Hudson group (a WOW subcommittee comprised mainly of energy auditors, QCI and production managers from subgrantee weatherization programs). These groups encourage open discussion regarding ways to improve low income weatherization services

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and provide a setting to inform grantees of program modifications. The Division engages with the network on a regular basis at WOW meetings, focus groups or Ad Hoc Work Groups to support the development of policy and implementation of energy related technologies. These groups provide technical support and data to evaluate proposals and assess measure implementation.

The Division participates in quarterly WOW meetings to provide updates and engage with the network on potential policy changes, training updates, quality assurance activities, and funding levels.

The Division and the subgrantee network are committed to advancing best practices for the workplace and for our customers served, especially for populations who have been historically underserved, marginalized, and adversely affected by persistent poverty. Projects include:

- Marketing and outreach materials (poster and brochure) have been redesigned to foster a welcoming environment. Each year the Brochures are translated to Spanish and Hmong.
- Braided and leveraged funding allows the flexibility to install additional repairs or measures to help the underserved.
- The management training plan provides workshops on best practices to support awareness among the network.
- A Combustion Safety training module is being developed (BPI 1200).

#### **V.7 Health and Safety**

Wisconsin's Health and Safety Plan is included in PAGE as Attachment 9.

A Health and Safety Checklist is required for each occupied unit in 1 to 4-unit buildings. The document has been reviewed to align with language from WPN 22-7. The Health and Safety checklist is attached and includes a customer sign off stating they have received the Radon pamphlet and have read the Health and Safety checklist sheet. Health and Safety Checklist is included as Attachment 10. The Heating System Checklist is included as Attachment 11.

The average of \$2,203 includes all H&S expenditures across all funding sources. It does include equipment replacement. See Section 6 of H&S Plan Attachment 9. The average DOE H&S is approximately \$732 per unit. DOE funds are not used for mobile homes.

Pollutants present in a house that may pose a risk to workers shall be removed by the occupants prior to the start of weatherization work on the home. Workers may remove no more than 2 small vessels no larger than 5 gallons each containing flammable materials or hazardous chemicals.

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## **Communicable Diseases**

Communicable diseases, also known as infectious diseases or transmissible diseases, are illnesses that result from the infection, presence, and growth of pathogenic (capable of causing disease) biologic agents in an individual human or other animal host. Infections may range in severity from asymptomatic (without symptoms) to severe and fatal.

- Each Agency shall monitor the spread and transmission of COVID-19 or other communicable diseases metrics within their service territory and take appropriate actions to protect the health and safety of weatherization customers and staff. State-wide communicable disease surveillance and control activities in Wisconsin are coordinated by the Division of Public Health, Bureau of Communicable Diseases.
- The Agency shall develop an Operations Plan following [WAP Memorandum 067](#) Guidance that addresses work practices and PPE equipment necessary to reduce the risk of worker exposure in the workplace (office, shop, warehouse, customer homes, etc.).

## **V.8 Program Management**

### **V.8.1 Overview and Organization**

The Division contracts with Community Action Agencies and a variety of public and nonprofit entities to deliver weatherization services. Some of these subgrantees also administer housing programs such as CDBG and HOME funded programs. The Bureau of Housing provides funding for homeless and special needs programs, as well as rental, home purchase and home rehabilitation assistance.

This results in a comprehensive set of services being offered to the state's low income customers. In addition to the Low Income Weatherization Assistance Program, the Division also houses the Low Income Home Energy Assistance Program and Program Services (Heating and Air Control). Together, these low income assistance programs comprise the Home Energy Plus programs. The Division also maintains close working relationships with the state's utilities to ensure coordination of services between programs offered by utilities and the state's Weatherization Assistance Program.

The Division retains staff to conduct monitoring of contracts, perform field inspections of projects, and provide technical assistance and oversight to subgrantees. The Low Income Energy Advisory Committee (LIEAC) is established to meet the requirements of 440.17. As required by 440.17(a) (1,2,3), membership is selected for special qualifications and sensitivity to the problems of low income persons, including their weatherization and energy conservation needs.

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Membership is also broadly representative of organizations and subgrantees, including consumer groups that represent low income persons in their area – particularly the elderly, disabled, and Native Americans. The committee has responsibility for advising the Division on the development and implementation of its Weatherization Assistance Program.

The Division Organizational Chart is attached to this application as Attachment 8.

### **V.8.2 Administrative Expenditure Limits**

Administrative expenditures are limited to 15% of the total DOE Grant allocation and are split 7.5% to State Administration and 7.5% to subgrantee administration.

### **V.8.3 Monitoring Activities**

Monitoring is completed to ensure subgrantees operate the program according to DOE rules and regulations, policies established by the Division, and to determine local training needs. The monitoring activities described in this plan apply to DOE funded activities. The comprehensive monitoring activities outlined below are conducted by The Division's Quality Assurance Section Staff, The Program and Policy Section Staff, as well as Slipstream, the Inspection Contractor.

#### **Quality Control:**

The Division's Quality Assurance (QA) Section staff, or Slipstream, the Inspection Contractor, conducts on-site monitoring of subgrantees. The in-house QA Section includes one lead technical assistant, three technical assistance monitors, one program and policy analyst and one Information Systems Business Automation Specialist that supports the program. The Section Chief, lead technical assistant and three Quality Assurance monitors receive the following training and related certifications:

- . Lead Safe Weatherization
- . Lead Renovator
- . Asbestos Operations and Maintenance and/ or Asbestos Supervisor
- . Weatherization Assistant training
- . Quality Control Inspector

The QCI Form used by subgrantees is not used by State or Slipstream staff. Specific measure details are captured in the HE+ system. The checklist used to confirm compliance is provided as Attachment 17, Building File Review Checklist, under SF424 in PAGE.

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Training and Technical Assistance (T&TA) funds pay for 6.05 QA Full Time Equivalent (FTE) positions. The Division uses Leveraging or Administrative Funds to pay for .3 QA FTE positions. The remaining Division QA FTE positions are paid for with DOE IJA/BIL funds.

Estimated travel costs for monitoring efforts will be funded by T&TA funds. The estimated travel costs for monitoring and technical assistance efforts for July 1, 2025– June 30, 2026, is approximately \$19,000. The remaining portion of expenses will be paid out of DOE IJA/BIL and non-DOE funds.

The Division is responsible for monitoring and oversight of work performed by subgrantees and will visit each subgrantee at least annually. More frequent QA monitoring will be performed if quality issues are discovered during visits.

Quality Control Inspectors (QCI) working for, or contracted by DEHCR, possess the knowledge, skills and abilities outlined in the National Renewable Energy Laboratory (NREL) Job Task Analysis (JTA) for Quality Control Inspectors. QA staff also provide onsite technical assistance. Supplemental technical assistance includes topics such as working safely on homes with lead or asbestos, forced air heating systems, boilers, procurement, process improvement, air sealing, mobile home weatherization, ventilation, and OSHA construction safety trainings. The QA section includes individuals with extensive experience managing subgrantee weatherization programs, and with building science, construction, engineering or architectural backgrounds.

All subgrantee final inspections for job completions reported since PY 2016 and beyond are performed by certified Quality Control Inspectors as outlined in WPN 22-4 Section 2. Wisconsin has implemented a Grantee Developed Quality Control Inspection Policy to ensure compliance with WPN 22-4.

Wisconsin is fortunate to have certified QCI professionals in the subgrantee network so that the certified QCI performing the final inspection does not perform the initial energy audit. If needed, two options are available for final inspection procedures:

Final Inspections are performed by a certified QCI professional who did not perform the initial energy audit and who was not a crew member who completed the weatherization work. Quality assurance monitoring will be performed on at least 5 percent of these completed units.

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Monitoring Final Inspections are performed on at least 10 percent of completed units where the final inspection for the building was conducted by the same Energy Auditor or QCI Inspector but who was not a crew member who completed the weatherization work. The Subgrantees shall notify the Division if this presents a problem due to the loss of a QCI staff member. Wisconsin does not anticipate this to occur. In the event it does, other non-DOE resources will be utilized to meet this DOE monitoring requirement.

The quality assurance monitors complete extensive file reviews on inspected units, and on additional other units. If significant deficiencies are discovered concerning health and safety violations, poor quality of material installation, or major measures missed, the Division will increase the number of units monitored or increase monitoring of subgrantee contract management practices as applicable until the deficiencies are remedied.

Subgrantees that have significant deficiencies will be referred to receive Production Based Training or will be required to attend training activities provided through the Standard Training Plan or other specialized technical assistance to improve performance (see Section V.8.4). Required subgrantee staff qualifications and training are tracked by Slipstream, our T&TA subcontractor, and compliance is verified during Administrative Reviews by Division staff.

**Comprehensive Monitoring Approach:**

Comprehensive monitoring of subgrantees is conducted as a six part set of activities designed to fulfill the requirements of WPN 20-4. The combination of these monitoring activities, in conjunction with periodic report assessments, provides an in-depth look at all program components. Monitoring checklists and tools used by both Administrative Review (AR) and field monitoring staff are attached. The Division completes all six of these activities for each subgrantee:

1. Administrative and financial reviews.
2. Dwelling unit inspections.
3. Client file reviews.
4. Agency Performance (Risk) Assessments
5. Training and technical support
6. QCI inspection process

**Activity 1: Administrative and Financial Review**

The Program and Financial Administrative Review (PAR and FAR) covers the general operations of the subgrantee with a comprehensive examination of program, financial, and management practices and outcomes. The AR, combined with the subgrantee's own fiscal audit, gives the Division an overview of the subgrantee's administrative capacity and capability. This includes a review of:

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- Subgrantee financial management,
- Accounting systems and operations,
- Invoicing, purchasing and procurement procedures,
- Inventory tracking,
- Payroll and personnel,
- Subcontractor management,
- Vehicle and equipment list,
- Health and safety policies,
- Record retention,
- Workflow and production,
- Worker training and certifications,
- Quality control procedures, and
- Additional aspects of local program administration and organization.

Checks are made that financial procedure manuals exist and are followed, including a review of cost allocation plans. Desktop monitoring of HE+ System Weatherization reports, and reports submitted by the subgrantee in advance of the virtual administrative review, contribute to the overall information profile of the subgrantee.

Each subgrantee receives an annual monitoring evaluation by Division AR staff to review a sample of materials confirming they meet or exceed program specifications. AR staff check the subgrantee's purchasing records to confirm that appropriate documents are maintained demonstrating that the materials purchased meet or exceed specifications. For subgrantees that maintain a warehouse, a spot check of Safety Data Sheet (SDS) availability is completed.

**Financial Audit:** In addition, each subgrantee is required to have a full financial and compliance audit conducted annually, unless total federal funding is less than \$750,000. If less than \$750,000, an audit will still be completed but not paid for with DOE funds. The Division reviews the annual audit and ensures the subgrantee takes any action necessary to correct problems identified by the audit. The Division will resolve questioned costs or recover funds if necessary.

Building Job File reviews for the Administrative Review are performed by the Division's Quality Assurance staff to allow for a comprehensive review of the technical items and audit modeling.

Upon completion of PAR and FAR, the AR staff hold an exit conference with the subgrantee staff. Discussions are being held concerning the observations from the review. Exit conference topics typically include:

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1. Programmatic strengths
2. Programmatic weaknesses
3. Training needs and recommendations
4. Deficiencies requiring immediate corrective action

A copy of the Division's AR Closeout Report will be provided to the subgrantee within 30 days with any requirements specified. When minor issues are identified, they will be reported as "Concerns" and the subgrantee will be responsible for making sure the issue is addressed. When deficiencies are identified as not meeting program standards, subgrantees will be required to take corrective action within 30 days through the Quality Assurance Plan (QAP). When recurring deficiencies are identified, the Division will determine the additional action that is appropriate.

### **Activity 2: Dwelling Unit Inspections**

Dwelling unit inspections review the quality and appropriateness of work (using criteria that align with the specifications outlined in WPN 22- 4 Section 2), conduct an assessment of the original energy audit, assess the accuracy and completeness of the pre and post work inspections, and other onsite items. Dwelling unit inspections include both in progress and completed units, with emphasis placed on in- progress units and repair items identified in the PAR or desktop file review. The Division will make additional onsite visits of work in- progress with all subgrantees to assess compliance with safe work practices, adherence to lead safe weatherization protocols, comprehensiveness of final inspections, and other applicable criteria.

The Division's subcontracted onsite QA inspections supplement the monitoring described above. The subcontractor, Slipstream, will submit a QA Inspection Worksheet, provide an extensive photo report of all weatherization work and any findings, and complete a Quality Satisfaction Survey with the customer on each inspected home. Quality Assurance (QA) monitors also complete extensive file reviews on every inspected unit, reconciling energy audit recommendations for the actual work completed and assessing the subgrantee's project management and internal Quality Control (QC) process. Reports prepared by the subcontractor will be used to assist the Weatherization QA Section in meeting Quality Assurance goals. Both Division inspections and subcontracted inspections are entered and compiled in the QA reporting database.

All required testing equipment is calibrated and in good working order.

To keep monitoring distinctively different from training, the QCI inspection subcontractor will not offer coaching, guidance, or advice when trying to assess an agency's capabilities. The exception to this is when a unique situation is encountered, and the staff member states that the situation in question is something that would normally require outside guidance.

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Follow up in person monitoring may be required if multiple items are identified that contain Health and Safety concerns or repeated items have been identified.

The virtual inspection format is like an in-field inspection but limits the amount of personnel present during the onsite visit. When feasible, the virtual inspection will align with the Agency final inspection. It encompasses a comprehensive desktop review of all job documentation, from the intake to the final agency inspection. Anytime during the virtual or the desktop review, all identified health and safety issues(s) will be addressed immediately by the subgrantee and verified during the virtual inspection.

Virtual inspections will be conducted in times of a public health emergency. DOE approved Wisconsin's virtual inspection process on February 10, 2021. The virtual inspections have worked well for the weatherization network and the Division's monitoring process when needed. The approved procedures will continue to be refined based on learned experiences and will be used as necessary during PY25.

**Virtual Quality Control Inspection (QCI) Workflow/Steps**

1. State QA staff will select buildings that have been marked WX completed or in the stage of being completed in the Home Energy Plus (HE+) WisWAP System
  - a. The buildings will be marked WX complete in the stage of being completed.
  - b. Buildings will contain DOE funding.
  - c. All required documents required in the previously approved in the Wisconsin Monitoring Plan will be in the document upload section including but not limited to the: mdb. file, field data collection form, audit pictures, combustion testing, blower door testing, health and safety form, work agreement, final inspection documents and final inspection pictures. This will also include additional information reworks and callbacks.
2. The group of buildings will be selected by the agency and will be sent to contracted QCI or State inspector by the Agency that would have the inspection completed during Agency Final inspection.
  - a. Contracted QCI or State inspector will contact the agency with the BID (Building Identification) to set up the virtual inspection concurrently with the subgrantee QCI inspection.
  - b. Contracted QCI or State inspectors will conduct a full comprehensive file review of QA inspection forms.
    - i. Items identified during the desktop review can be clarified during the virtual inspections.
    - ii. If the final inspection happens during the time the crew was onsite, any identified item that is corrected at that time will be marked as identified and corrected on the inspection form.

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3. The contracted QCI or State inspectors will review the contents of the file, along with viewing the home via Google Earth or Street View if available. Notes are made in preparation.
4. Two people from the agency are present for the final inspection. The two individuals will video call the contracted QCI or State inspectors monitoring team from the vehicle once they have arrived (and are set up).
5. If a hands-free device is used, two people will not be required for inspection.
6. One of the agency staff will be the QCI who conducts the inspection, and the other will hold the device to ensure a clear and focused video of the inspection that is being conducted.
7. The QCI must focus on the inspection and not the device so that the procedures can be accurately observed.
8. The QCI describes each activity like they would during a proctored field exam.
9. Everything that the final inspector would normally do is completed and video streamed.
10. If necessary, the contracted QCI or State inspector staff may ask the subgrantee staff to slow down, stop, explain, or show a closer shot of certain measures.
11. The diagnostic testing is highly important, and the camera must be angled to clearly see the meters, gauges, setup, location of testing, and appliance operation. It is assumed this will take the most time of the inspection.
12. The agency should have more than one device available as a backup if the battery life for the first device is not long enough to support the entire final inspection.
13. As the final inspection is ending, the contracted QCI or State inspector will provide subgrantee staff with an opportunity to address anything they might have missed.
14. If it appears the home is being left in an unsafe condition, the contracted QCI or State inspectors will alert the subgrantee staff so the issue can be immediately corrected, and notations will be made for the monitoring letter.
15. Observations will be made about how the inspectors addressed problems with the work or missed opportunities.
16. The final inspection visit will be compared to the client file, and technical client file, technical testing, and final inspection tool for consistency as the final inspection procedures are concluded.

QA inspection subcontractors that report inspections not completed, report findings clearly contradicted by their photo report or by the subgrantee's final inspection, fail to maintain required permits and insurance coverage, or deliver inspection reports that materially misrepresent the weatherization work completed may have current inspection contracts suspended. In especially egregious cases, as required by WPN 20-4, the Division reserves the right to debar a subcontractor or any successor company from providing services to Wisconsin weatherization subgrantees.

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Wisconsin weatherization program standards provide clear guidance to subgrantees regarding contractor performance management, to conform with DOE requirements and State law. Included is specific information on actions or conditions that may result in termination of a contract. The Division requires that subgrantees report every case where a contract is terminated for cause. As required by WPN 20-4, the Division may, upon review of the circumstances, debar that contractor from performing work for any subgrantee for a specific period. The Division will comply with 2 CFR 200.338 and 2 CFR 180 when proceeding with debarment.

**Activity 3: Customer File Reviews**

Customer file reviews verify the completeness of documentation among other items. File reviews will be completed, as noted, for every DOE funded building inspected. The QA team selects and reviews an additional sample of client files, including clients to whom service was deferred or denied. Numerous criteria are evaluated for each file including customer eligibility, accuracy of the energy audit, completeness of the work order, inspection certification forms, and compliance with health and safety requirements. Compliance with policies related to the service of rental properties will be verified. Subgrantees will upload customer file information directly into the reporting system allowing for desktop monitoring by grantee staff. The desktop monitoring will assist determination of priorities for subgrantee training needs or identify compliance issues. Attachment 17 is the form used for Desktop Building File Review.

The Division's monitoring goals for this program year for each subgrantee are:

1. All 17 subgrantees will have both a financial and program administrative review conducted.
2. Onsite QA inspection will occur on a minimum of 5% of the DOE funded units weatherized statewide. Inspections are distributed throughout the program year.
3. Inspection of files will occur at a minimum of 5% of the DOE funded units weatherized statewide.

In addition, each subgrantee is required to have a full financial and compliance audit conducted annually, unless total federal funding is less than \$750,000. If less than \$750,000, an audit will still be completed but not paid for with DOE funds. The Division reviews the annual audit and ensures the subgrantee takes any action necessary to correct problems identified by the audit. The Division will resolve questioned costs or recover funds if necessary.

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Upon completion of a monitoring visit, the QA staff holds an exit conference with the subgrantee staff. Discussions are being held concerning the observations from the visit. Exit conference topics typically include:

1. Programmatic strengths
2. Programmatic weaknesses
3. Training needs and recommendations
4. Deficiencies requiring immediate corrective action

A copy of the Division's QA report will be provided to the subgrantee within 30 days with any requirements specified. When minor issues are identified, they will be reported as "Concerns" and the subgrantee will be responsible for making sure the issue is addressed on future jobs. When other deficiencies are identified as not meeting program standards, subgrantees will be required to take corrective action within 30 days. When recurring deficiencies are identified, the Division will determine what additional action is appropriate.

The Division's Quality Assurance monitors follow up on items addressed in Administrative Reviews on a regular basis throughout the year and by utilizing desktop reviews. If a subgrantee fails to resolve an issue, the Division reserves the right to take any of the following actions: withhold reimbursement until corrected, modification, suspension, or termination of the contract.

The Division may have follow-up telephone contact regarding any complaints about the quality of workmanship. If additional investigation is required, an onsite visit may be completed to verify the quality of work being performed meets federal and state specifications. In the event the quality of the work was substandard, the subgrantee will be required to correct the deficiency.

#### **Activity 4. Agency Performance (Risk) Assessments**

In addition to the monitoring activities described above, the Division utilizes several tools to continuously assess each subgrantee's risk of noncompliance with state and federal regulations. These tools include, but are not limited to:

- The Contract Planning Workbook is a division designed budgeting tool that assists in assessing prior experience with weatherization awards, personnel levels and training needs, and in determining labor rates.
- Comparison of estimated measure costs with actual reported costs analysis completed annually by Slipstream.
- Annual training plans developed by subgrantees.
- Annual financial audits completed by each subgrantee per 2 CFR 200.501.

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- The State of Wisconsin Single Audit. The Weatherization Assistance Program is identified as a major program that is audited periodically. Any audit finding is identified in a summary memo from the State of Wisconsin Legislative Audit Bureau.
- Annual Subgrantee Performance Assessments are performed using a subgrantee weatherization program evaluation tool developed by the Division for this purpose.
- From DEHCR's perspective, a performance assessment is an evaluation of each subgrantee's ability to operate the Wx Program according to DOE rules and regulations and policies established by the Division. The results of each subgrantee's assessment will identify if there is any cause for concern and/or reasons for additional focus from the QA Monitoring and/or the AR teams, and the potential need for refresher training opportunities. A subgrantee may be required to develop a Corrective Action Plan, as necessary based on their assessment scores. Subgrantees with higher scores may receive more intensive or more frequent monitoring.
- Quarterly Contract Performance Reviews are performed based on production goals, building unit goals and fund expenditures identified in the approved annual Weatherization Monthly Contract Plan. Funding may be adjusted because of the reviews. If a subgrantee is not within 10 percent of planned production and expense goals, they may be required to provide a plan describing how they will meet contract expectations by the end of the following quarter.

A report on successes and significant problems will be completed regarding the level of subgrantee monitoring, major findings and resolutions, and training and technical assistance needs in all agency functions including programmatic, administrative, technical, and financial areas. Subgrantees that are considered by the Division to be at risk due to extensive production or quality issues, financial issues, or program management concerns may be required to create an action plan detailing an improvement strategy. The Division will report on the status and success of agency improvement strategies and training. Confirmed sensitive or significant noncompliance findings, such as waste, fraud, or abuse will be reported to DOE immediately.

#### **Activity 5. Training and Technical Support**

Training and technical assistance are provided during in-progress visits as needed. If imminent health and safety concerns are identified on the job site, the subgrantee is required to address such issues immediately. The Division will make as many visits as necessary and for which resources are available. If additional technical support is needed, Production Based Training will be requested through Slipstream Training and Technical Support as noted in the training section.

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### **Activity 6. QCI Inspection Process**

In addition to QA Section staff, one technical inspection subcontractor is used to complete onsite QA inspections of completed jobs. The Division entered into a contract agreement for technical inspection services with Slipstream. Slipstream has six certified QCI staff performing technical inspections for the Division. The Division verifies the subcontractor QCI certifications annually. The inspection subcontractor, under the direction of QA Section staff, evaluates completed units to determine whether they were an eligible unit for weatherization and if the quality of the work meets the standards established by DOE and the Division. Although the subcontractor may conduct onsite evaluations of weatherized units, subgrantee oversight will continue to be primarily the responsibility of the Division and part of the QA Section's duties. QA Section staff may conduct follow up inspections where required. Subgrantees are not allowed to use additional DOE funds on inspected jobs that require reworks or warranty work. Wisconsin follows the BPI procedures for ethics. See Attachment

#### *Refrigerator Shortages and Delays*

To provide relief to agencies impacted by the shortage of refrigerators due to manufacturer delays. Wisconsin received DOE approval on March 10, 2021, to allow agencies to follow the process below for DOE funded job with refrigerators:

The final QA QCI inspection will be conducted, excluding the inspection of the appliance. Once the job is complete, it will be invoiced with the appliance not being installed and marked in the HE+ System/WisWAP as "not installed". When appliances become available, the subgrantee will add/edit measures to add the appliance and attach it to the original job by marking the new job number with an "r" (r=rework). When the appliance is installed, the agency will request a rework, and it will be displayed on the HE+ System Dashboard for Division approval.

Funding for the installed appliance will include Public Benefits or LIHEAP. DOE funding will not be an option for the invoice submission. The request to approve the rework will include notes in the System and will include documentation (Date/Time) of a phone call with the client regarding the installation, installer, condition of the appliance and quality. If concerns are brought up by the client, an onsite inspection will occur. The HE+ System will track open reworks, completed reworks, length of time before rework is completed, and approval date of the rework. The audit is uploaded to the HE+ System. The System will also record measures and the cumulative SIR.

The monitoring schedule is included as Attachment 12.

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The Division does not provide services directly to low income families. As such, the provisions of WPN 20-4 related to “Direct Service Grantees” do not apply.

Supporting documents include Attachment 4-8.

#### **V.8.4 Training and Technical Assistance Approach and Activities**

##### **Standard Training Plan**

In January 2024, the Division received Governor’s Office approval to enter into sole source renewal for a three-year contract agreement (with two optional two-year renewals) for Training and Technical Assistance (T&TA) services with Slipstream. Administered and delivered by Slipstream, the Standard Training Plan provides specific trainings available to subgrantees each year. This training system provides courses at basic, intermediate, and advanced levels for installers, crew leaders, energy auditors, final inspectors, data management, program support staff, fiscal, and program management staff. This allows Wisconsin to offer Comprehensive Training for all WAP personnel (as required by WPN 22-4, Section 3), as needed, based on the individual check-ins with the subgrantees. Training content addresses 1-4 unit and 5+ multi-units for site built housing and manufactured homes.

Training content is delivered through classroom, online training, skills building activities, virtual webinars, demonstration props, computer labs, and field hands-on to support effective education. Under the existing Standard Training Plan and funding level, the training system has the capacity to provide up to 1,200 in-person, virtual webinar, or online self-directed training slots per year, with more than 50 training sessions. While core training courses are delivered each year, the annual work plan varies based on training needs assessments and funding levels.

As a part of the annual planning process, the Division provides subgrantees with a list of potential training courses for the upcoming year. Subgrantees are required to complete an annual T&TA planning workbook which outlines T&TA activities for the contract period based on their allocation. The subgrantee plans include the training needs assessment survey, training not available through the training contract, local training delivery systems, the costs of sending staff to trainings, and customer education delivery. Subgrantees are asked to identify specific training needs within and in addition to the Standard Training Plan.

Commonly identified training needs are added to the annual statewide training plan. Uncommon subgrantee training needs must be supported by the subgrantee’s local plan. Urgent or unavoidable training needs may be supported through individual agency training requests (see the Specific Training section).

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As a part of the T&TA planning process, Slipstream develops an annual work plan based on subgrantee annual T&TA planning results, real-time surveys, and other DOE requirements, including but not limited to DOE Project Officer feedback. The work plan is reviewed internally by Division staff. To be responsive to subgrantee needs, a mid-year T&TA check in is completed via electronic survey to review current and upcoming training needs. Based on the summarized results of the survey, the Division works with Slipstream to adjust the training work plan, if needed and support longer term T&TA planning efforts annual subgrantee T&TA planning training needs assessment,

Of the statewide T&TA services (29%) and subgrantee's local T&TA budgets (17%), we anticipate approximately 55% for State staffed monitoring and oversight of subgrantees. 29% Statewide T&TA services include the training program, technical assistance and development projects, and Quality Assurance inspections.

Training is provided through various delivery mechanisms. Wisconsin's Comprehensive training program includes standard training courses encompassing occupation specific training programs associated with the WAP Job Task Analyses (JTA). Wisconsin's Standard Training Plan provides a central training framework and addresses both short- and long-term training needs. The subgrantee T&TA plan, referenced above, provides funds to subgrantees for local training needs and initiatives, and having staff attend training sessions or complete online self-directed training identified as a priority and offered through Slipstream, the T&TA contractor training center.

Regular JTA aligned training is offered annually as needed based on the annual needs' assessment and changes to the program requirements, technologies, and techniques.

The Division characterizes training activities as a specific training session or a system of training sessions, while technical assistance activities are characterized as program development projects or maintenance. Both training and technical assistance deliverables are driven by the overall objectives of saving energy and sustainability. To reach those objectives, the provider network must deliver quality installations, at the lowest possible cost, to the greatest possible number of dwellings. Every training or technical assistance activity delivered is considered in the light of those objectives.

### **Training Activities**

#### **Comprehensive training:**

Attachment 21 Provides a tentative schedule for in person trainings.

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### **Energy Auditor Certification**

Since 2003, Wisconsin has been providing annual Energy Auditor training with a certification test at the end of the training. The Wisconsin Weatherization Energy Auditor Certification became mandatory for all energy auditors on July 1, 2009. Certification requires successful completion the Energy Auditor training (classroom and field) and the Introduction to Weatherization Assistant course. The Introduction to Weatherization Assistant includes training on the National Energy Audit Tool (NEAT). Since 2007, over 270 Energy Auditors have been trained and certified to work in Wisconsin's program.

Per the Home Energy Plus Weatherization Program Manual, all people auditing homes with the Wisconsin Weatherization Assistance Program shall obtain a Wisconsin Weatherization Energy Auditor Certification within 12 months of beginning to audit homes for the program.

Staff working toward a Wisconsin Weatherization Energy Auditor Certification will be considered an Energy Auditor Trainee and shall have their audits reviewed and signed off on by a certified Wisconsin Weatherization Energy Auditor. Completion of the Wisconsin Weatherization Energy Auditor Certification requirement advances the energy auditor beyond the trainee status. Four requirements shall be completed to become a certified Energy Auditor:

1. Meet the DOE Weatherization Assistance Program Core Competencies expectations for Basic Energy Audit Competencies, which are:
  - Ability to read and write legibly;
  - Basic verbal and written communication skills;
  - Basic construction knowledge;
  - Basic math skills; and
  - Basic computer skills.
2. Complete and pass the Building Science Principles course.
3. Complete and pass the Energy Auditor course (classroom and field).
4. Complete and pass the Introduction to Weatherization Assistant course.

The Building Performance Institute (BPI) Home Energy Professional (HEP) Energy Auditor (EA) certification is not required for energy auditors working in Wisconsin's program. BPI HEP EA certification is required for individuals working toward BPI HEP Quality Control Inspector (QCI) certification.

### **Quality Control Inspector Certification**

In 2019, the BPI HEP Quality Control Inspector (QCI) certification changed to a micro credential under the BPI HEP Energy Auditor (EA) certification.

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About one third of Wisconsin's QCI certified individuals will need to complete recertification for renewal of their BPI HEP EA and QCI during PY25-26. During PY26, the focus will be supporting individuals to achieve initial or renewal BPI HEP EA and BPI HEP QCI certifications to meet the Division's per agency QCI goal. Slipstream will support individuals through the BPI HEP EA and QCI renewal processes including completion of required applications as well as scheduling and proctoring field exams.

The Division and Slipstream will work with current new QCI candidates (approximately 15 individuals) to ensure they have EA prerequisites and support them through the BPI HEP EA application process as well as the BPI HEP EA written, BPI HEP EA field and BPI HEP QCI written proctored exams.

In support of individuals challenging the BPI HEP EA and QCI certifications, the following refresher courses have been developed by and are offered through Slipstream.

- BPI HEP Energy Auditor Written Exam Prep (online self-directed)
- BPI HEP Energy Auditor Field Exam Prep (online self-directed or in person)
- BPI HEP Quality Control Inspector Written Prep (online self-directed)

Access to the online refreshers will be available to existing certified staff or to new staff seeking certification. Additional training support for written or field exams will be determined based on identified subgrantee need.

The Division and Slipstream will inform QCIs regarding Continuing Education Unit (CEU) opportunities to ensure enough CEUs are attained to bypass having to challenge the EA and QCI written exams during the next recertification phase. Presently, QCI certified individuals have access to five Slipstream created online CEU activities equating to 7.5 QCI specific CEUs.

Certification documentation will be obtained from each BPI HEP EA and QCI certified individual. Certification dates and renewal dates will be tracked in the training tracking database for individual, subgrantee, and Division access. Slipstream will provide individuals with reminders 2-3 months in advance of renewal deadlines.

### **Building Science Principles**

The Building Science Principles serves as an entry level training course for field staff, energy auditors and inspectors as well as any other program staff. This session focuses on the science/physics of air flow, heat flow and moisture flow, and illuminates the concept of "House as a System" thinking by providing examples, then tests application of knowledge and comprehension

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with a case study. The training will be offered during PY25-26 primarily as self-directed online training, but in person sessions will also be offered as needed. This training course serves as a pre-requisite course for Retrofit Installer, Crew Leader, and Energy Auditor training programs.

**Retrofit Installer**

The Retrofit Installer training program correlates with the 2019 NREL Weatherization Crew Leader JTA of which Retrofit Installer is a component. The training program consists of three courses: Building Science Principles, Basic Blower Door and Air Sealing, and Retrofit Installer. The Basic Blower Door and Air Sealing and Retrofit Installer courses may be offered multiple times during the program year is based on subgrantee feedback in the T&TA Planning Workbook Needs Assessment Survey. Slipstream's current IREC accreditation for the Retrofit Installer training program has been renewed through December 13, 2027.

**Weatherization Crew Leader**

The Weatherization Crew Leader training program correlates with the 2019 NREL Weatherization Crew Leader JTA. The training program consists of one course: Weatherization Crew Leader. Weatherization Crew Leader is offered during the program year based on subgrantee feedback in the T&TA Planning Workbook Needs Assessment Survey. Slipstream's current IREC accreditation for the Weatherization Crew Leader training program has been renewed through December 13, 2027. A trained crew supervisor will be on site for each weatherization job.

**Energy Auditor**

The Energy Auditor training program correlates with the 2023 NREL Single-family Energy Auditor JTA. The training program consists of three training courses: Building Science Principles, Energy Auditor (classroom and field), and Introduction to Weatherization Assistant. Each of these training courses are planned to be held at least once during PY26. Slipstream's current IREC accreditation for the Energy Auditor training program has been renewed through December 13, 2027.

**Quality Control Inspector**

The Quality Control Inspector (QCI) training program correlates with the 2023 NREL Single-family Quality Control Inspector JTA. The QCI training consists of one course: Quality Control Inspector. Depending on the identified need from the T&TA Workbook Needs Assessment Survey this session will be offered to ensure staff have adequate training to prepare for the BPI HEP QCI credential and to provide accurate quality control inspections. Wisconsin requires individuals seeking BPI HEP QCI certification to complete QCI training prior to challenging the certification exam. Slipstream's current IREC accreditation for the QCI training program has been renewed through December 13, 2027.

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**Multifamily Energy Auditor training** – The Division is working with Slipstream to deliver a certified Multifamily Energy Auditor training program. This training is planned for advanced energy auditors. This session may be offered once during the program year based on subgrantee feedback in the T&TA Planning Workbook Needs Assessment Survey.

**Refresher and Additional Training** - The training is aligned with components within the Weatherization Crew Leader, Energy Auditor, and/or the Quality Control Inspector NREL JTAs for the retrofit installer, crew leader, energy auditor and inspector program field staff – this training serves as refresher training for existing personnel but can also be completed by individuals new to the program. Retrofit technicians, crew leaders, energy auditors and QCIs are required to take additional comprehensive refresher training as identified through monitoring visits.

Training may be offered based on the annual T&TA planning workbook completed by each subgrantee, which includes a needs assessment survey. Wisconsin continues to invest in an online learning management system (LMS) for weatherization training. Existing training content will be managed and updated, as necessary. New content is being developed, and existing in person content will be transitioned to online content where feasible. See below for detailed information regarding each of the training courses.

Wisconsin's biennial technical training event, ***Weatherize Wisconsin: Building Science at Work***, was held September 17-19, 2024, in Rothschild. The Weatherize Wisconsin training event provided a venue for Wisconsin's weatherization professionals to showcase best practices and cost-effective solutions. Over 45 training topics were delivered during the event including refresher training reinforcing the JTA for energy auditors, inspectors, crew leaders, and installers. Health and Safety practices for lead, asbestos, and radon, OSHA, and Standard Work Specifications are also topics incorporated into the framework of the training event. Planning will begin for the 2026 training event.

### **Specific Training**

#### **Production Based Training (PBT)**

The PBT system, Wisconsin's Specific Training program, was developed to provide training and/or technical assistance support for subgrantee staff and subcontractors with deficiencies noted through Quality Assurance monitoring or other performance factors. Typically, the process starts with an agency request or Quality Assurance staff identifying specific needs and assessing the severity of the issue. Slipstream receives a request to provide onsite training and/or technical assistance within one month of the request. Training is available for a wide variety of building science, diagnostic testing, and modeling topics in addition to administration, financial procedures, and weatherization technical requirements. Examples of PBT include advanced air sealing and new auditor mentoring.

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These visits can be combined with technical assistance to provide onsite support in a technical area. Visits for PBT are designed to provide training and support for specific field staff or contractors. The support is primarily hands-on technical training, delivered without a classroom, during the weatherization process.

The trainer works directly with the field staff to improve their skills while completing a job. PBT immediately targets subgrantees with deficiencies noted through Quality Assurance reviews and other performance factors, with the goal of providing training within a month of the referral. PBT may also be provided when an agency has a number of new staff in need of training such as Basic Blower Door and Air Sealing. In this case, the agency would fill in all of the available slots in the state-wide training, therefore comprehensive focused training is offered to the agency.

**Health and Safety Training**

The following table indicates the Required Health and Safety Trainings for Agency Employees and is included as part of the T&TA Planning Workbook that is completed by each sub-grantee for planning and budget purposes based on their T&TA budget allocation.

Training	Auditor	Crew Leader	Crew Worker	Final Inspector (Complaint Inspector)	Hazardous Materials Coordinator
Lead Safe Renovator <sup>1</sup>	Yes	Yes	Yes	Yes	Yes
Asbestos O&M and annual refresher	Yes	Yes	Yes	Yes	n/a
Asbestos Supervisor	Optional <sup>2</sup>	Optional <sup>2</sup>	Optional <sup>2</sup>	Optional <sup>2</sup>	Yes
Asbestos Inspector	Optional <sup>2</sup>	Optional <sup>2</sup>	Optional <sup>2</sup>	Optional <sup>2</sup>	Yes
Mold Awareness	Yes	Yes	Yes	Yes	Yes
OSHA 10-Hour	Yes	Yes	Yes	Yes	Yes
OSHA 30-Hour	Optional	Optional <sup>2</sup>	Optional	Optional	Optional <sup>2</sup>
Respirator Medical	Yes	Yes	Yes	Optional	Yes
Respirator Fit Test	Yes	Yes	Yes	Optional	Yes
Blood Lead Level Test <sup>3</sup>	Yes	Yes	Yes	Optional	Yes

Notes:

1. Most Agencies train all field staff to Renovator level.
2. This training course is optional for these staff but recommended by the Division.
3. A blood lead level test shall be performed annually for any staff that would come in contact with painted surfaces in a customer's home.

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The Subgrantee is responsible for ensuring their personnel are properly trained and certified when certification is required (e.g., Lead Safe Renovator), including required respirator training and fit testing.

Health and Safety Training is not offered through the T&TA Contract with Slipstream due to varying subgrantee staff renewal time frame requirements and training needs for incoming staff within each subgrantee. The Wisconsin Department of Health Services accredits market based training providers on Health and Safety topics for Lead, Asbestos and Radon.

Additionally, Health and Safety Topics are discussed in the “Weatherization Shorts” newsletter and through in person and online refresher trainings.

The Health & Safety Certification Report was finalized and is available to Subgrantees and the Division to support US DOE’s tracking and reporting requirements. Agencies submit health and safety updates for tracking in training database for agency staff.

**Weatherization Assistant Technical Assistance**

Subgrantees can request technical assistance in support of updates, implementation and troubleshooting related to the Weatherization Assistant modeling software.

Additional training and technical assistance are available for subgrantees whenever the Division identifies lower performance levels. Additional studies have been performed to identify and record high performing subgrantees to determine what helps them succeed. Peer exchange is facilitated to share high performing subgrantee process and procedures with other subgrantees within the state.

**Other Miscellaneous Training**

The Division hosts an annual training event, **Home Energy Plus Training Event**, bringing together the Division and staff from the energy assistance program, Program Services, the weatherization program, and utility representatives. The training event conducts concurrent sessions focusing on weatherization, Program Services, energy assistance, program partnerships, and creative coordination efforts. Approximately 230 participants from all the programs can network, learn about other resources available to customers, and improve collaboration. The event was held February 11-13, 2025, for 235 participants and provided the opportunity to attend 34 workshops.

During the training event, the Division hosts a coordination session bringing together weatherization agencies and their energy assistance counterparts to discuss program referral and communication processes to support service delivery. Planning will begin in July 2025 for the 2026 Home Energy Plus Training event January 27-29, 2026, in Wisconsin Dells.

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Additionally, Wisconsin is the host state for the **Better Buildings: Better Business Conference** that partners with the statewide and regional home performance network. Traditionally, the conference offers 2 days of workshops focusing on building performance, mechanical systems, diagnostic testing, customer education and services, with sessions providing BPI continuing education credits. The renewed event was held February 27-28, 2025, offering a variety of building science, technical, research, and programmatic workshops with CEUs available for participants. The next in person event is planned for Spring 2026.

**Management** training is also offered in conjunction with the Weatherization Operators of Wisconsin quarterly meetings. These training courses can range from a half day to one full day depending on the training content.

General topics may include:

- Management & Supervisory Series: Leadership; Communication; Supervisors and the Law
- Financial Management: Cost Allocation & Accounting, 2 CFR 200, Administration & Support
- Procurement and Subcontractor Management: Packaging & Awarding Bids, Quality Control, and Right-to-Cure
- Weatherization Outreach and Marketing
- Comprehensive Energy Audit Review
- Succession Planning for Key Staff
- Recruitment and retention of employees

#### **Required Subgrantee Training Attendance**

Subgrantee attendance is typically required at training sessions or meetings where Division policy changes are reviewed. Specific training and applicable certifications are required for lead renovator, mold and moisture awareness, and asbestos disciplines to allow for the safe weatherization of buildings, and proper work procedures when mold and moisture problems are present. A trained crew supervisor is required on site for each weatherization job. The contract with the subgrantees states that Agencies shall send at least one representative to any training or meeting identified by the Division as "Required."

#### **Training Management and Tracking System**

The Home Energy Plus Training Management and Tracking System (TMTS) provides training information and training staff recordkeeping as well as supporting training administrative functions. All information related to weatherization training courses (in person, online or virtual webinars), informational webinars, training events or conferences, as well as special meeting or activities such as PBT and training retention activity participation is tracked in this system. Attendance for all training is tracked in the TMTS maintained by Slipstream. The database is also used to track required training and Wisconsin Weatherization Energy Auditor and BPI HEP EA and QCI certification dates.

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The TMTS interaction with the Home Energy Plus T&TA website includes the events calendar, online registration and posting of event specific materials. Reports detailing student participation are available to individuals, agency managers, and Division staff through the Home Energy Plus T&TA website and the TMTS.

The TMTS will be upgraded for website and data security beginning in 2025. A Request for Proposal will be released April 2025 to procure a vendor to make upgrades.

**Major Home Energy Plus Technical Assistance Projects for PY2025-2026**

Broadly, technical assistance funds are used to enhance and maintain the quality of the services available to Wisconsin's Weatherization Assistance Program customers. Projects vary widely, and examples include research on specific weatherization measures or an onsite consultation for a subgrantee on quality assurance issues. Generally, a project must in some way work to further the objectives or requirements of the program. Listed below are the in progress or planned technical assistance projects for this funding period.

**Weatherization Customer Education (Guidebook and Fact Sheets)** – Maintenance and updates of the Weatherization Customer Guidebook will continue. This web-based consumer education tool allows subgrantees to create a customized guide noting the weatherization measures completed for each single family home weatherized. The Guidebook includes maintenance requirements for measures, as well as general energy management tips. The Guidebook went live on October 1, 2008, and is required for DOE funded single family, duplex units, and 3-4 units. Features and measure information are modified as needed based on changes to technologies installed in the home.

Additionally, program energy conservation measure information or fact sheets are developed for use by the subgrantees. Recent additions included high efficiency clothes washers and carbon monoxide information sheets. The documents are available for individual use or as part of the Weatherization Guidebook.

**Document Design Services** – Document design and support for the Home Energy Plus Programs brochure, informational materials, the Wisconsin Weatherization Assistant Guide, the Wisconsin Weatherization Procurement Guide, and the Weatherization Field Guide. Wisconsin's Weatherization Field Guide meets the SWS requirements outlined in WPN 22-4, Section 1. The Wisconsin Weatherization Field Guide is reviewed and updated annually to address program needs.

**Weatherization Measures Support** – Analysis and maintenance of measures and field protocols. Currently in progress is an annual review of measure savings to investment ratios, combustion safety protocols, heat pumps and new water heater technologies.

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**Self-Evaluation Savings Study (SES)** – Starting in 2007, Wisconsin completes a Self-evaluation Savings (SES) study analyzing the savings achieved in weatherized natural gas units, on an annual basis. Actual pre- and post- weatherization natural gas and electric consumption is collected from regulated utilities. Data collected is utilized in an analysis of the therm and kWh savings of weatherized homes from the most recent program years. Generated results from the analysis are presented in a detailed report providing information for the full program and at a Subgrantee level.

**Technical Shorts Newsletter** – Continue development and delivery of the biannual Technical Shorts newsletter. The goal of the newsletter is to highlight health and safety topics, provide information on new tools and apps, and provide reminders or refresher information regarding measure installation or diagnostic testing.

**Energy Audit Maintenance** – Energy audit maintenance, coordination, and enhancement including managing the setup libraries, program upgrades, and customizing the audit, as feasible, for Wisconsin use. The Division, with support from Slipstream, performs maintenance and updates for the electronic Energy Auditor Field Data Collection Form.

**Program Support Tools** – The Division with support from Slipstream performs maintenance and updates for the electronic Diagnostic Workbooks (1-2 unit, 3-4 unit, and 5-24 unit). Additionally, the Division supports the WORCS application used by agencies to perform job status tracking, inventory management, and job costing.

**Home Energy Plus Information Call Center** – Provides for the operation and management of a call center. This tollfree number serves as an entry port for the public to the Home Energy Plus programs. Over the past five years, the Call Center fielded nearly 70,000 calls on average annually related to the Energy Assistance and Weatherization Programs.

**Home Energy Professional Quality Control Inspector Planning** – As noted in Section V.5.3, Wisconsin has implemented a Grantee Developed QCI policy to comply with WPN 22-4 Section 2.

**Workforce Expansion Activities** – Wisconsin will continue support of workforce expansion activities including:

- Update the existing circular for subgrantees to adjust for crew vs contractor based providers. The circular is used for outreach to high schools and technical colleges to build interest for skilled trades in the weatherization industry. Showcase job opportunities across the green buildings and energy efficiency industry.

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- Continue facilitation of the Workforce Development Work Group in support of development of workforce recruitment and retention training, materials, and processes.
- Coordinate with utility green job career fairs in Wisconsin to staff a Weatherization focused area for job seekers to visit.
- Continued support of the Interstate Renewable Energy Council (IREC) Workforce Enhancement and Innovation Grant project, *Green Workforce Connect* and Wisconsin participation in the project activities.
- DEHCR staff support the NASCSP Wage Study/Survey results compilation and disbursement.

**v.9 Energy Crisis and Disaster Plan**  
**Energy Crisis Plan**

In an energy crisis/disaster, WI WAP will not use DOE funds for energy or crisis related work, but only to provide WAP services as stated below. The State has access to State Public Benefits funding, as well as LIHEAP, so no DOE funds will be used for these activities.

**Wisconsin Disaster Response Plan**

In accordance with DOE's Weatherization Program Notice 12-07, the declaration of a disaster by the President or Governor is sufficient cause for the State of Wisconsin WAP to implement a series of amended procedures in those affected areas to allow the WAP subgrantee agencies to address the needs of the WAP eligible or previously weatherized low income families affected by disaster conditions. Wisconsin recognizes that WAP has a very limited role in any disaster response plan. The use of DOE WAP funds is limited to eligible weatherization activities and the purchase and delivery of weatherization materials.

**Allowable Re-Weatherization Activities**

For communities or counties in Wisconsin that the President or Governor has declared a disaster area, local WAP subgrantees will be permitted to use DOE resources (truck, equipment, staff labor, and materials) and funds to re-weatherize affected homes after FEMA funds and insurance payments have been applied to the repair of the structure. The re-weatherization work will be performed in accordance with field procedure guides already established by the Wisconsin WAP and will include the following allowable costs:

- Limited cleanup in those areas of the home where WAP services will be provided. These costs will likely be charged as incidental repairs.
- The performance of an energy audit to determine the services to be provided. The audit will take into consideration all existing WAP materials previously installed and still intact and useful.

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- Mechanical systems (central heating, hot water, etc.) and appliances will be inspected, and repaired or replaced as needed based on damage and wear and according to our usual standards.
- The auditor may consider deferring the job if the damage to the home appears to impact the structure and the materials to be installed cannot be safeguarded.
- The file must contain documentation of the damage through reports and digital or printed pictures of the affected area.

Each unit will be reported with specific tracking codes in WisWAP. This notation will be part of the data entry, so it can be easily identified and sorted for future reference. The costs for these re-weatherized units will be reported to DOE in the same manner as other re-weatherization cases.

### **Work in Progress Cases**

In some cases, the local WAP agency may have work in progress at homes where severe damage has occurred. These units and the associated costs have not been reported to DOE yet there may be significant loss of resources due to the damage.

These homes will be identified in the HEPLUS/WisWAP system so that proper reporting of costs can be easily tracked.

### **V.10 Dispute Resolution Process- NEW**

For an escalated complaint, or dispute, the Division will attempt to mediate. This process will include gathering all the information and communicating between the agency and the client to determine the situation, the apparent issue and the current status.

In many cases disputes are not fixable due to the type of complaint such as the customer demands something outside the scope of weatherization. However, if egregious errors are identified through the dispute process, the state will require the agency to rectify the situation.

### **V.11 Investigating Allegations of Fraud, Waste and Abuse-NEW**

Further discussion and analysis will be ongoing and determined by the submission of the state plan.