

Appendix A | Summary of Changes

The table below shows significant program and policy changes for Fiscal Year 2023-2024. The effective date for all revisions is July 1, 2023. See the chapter and section for more details.

Section	Topic	Revision
1	Definitions and Acronyms	Additions of terms to aid staff understanding.
2.1.12	Administrative Review	At a minimum, conference calls shall be attended by the agency Executive Director and Wx Program Director and/or Finance Director as appropriate.
3.3 (4)	Building Eligibility	<p>Re-weatherization for units weatherized on or before 7/1/2007, customer must have eligible application, all funding sources (PB, LIHEAP, DOE)</p> <ul style="list-style-type: none"> Previously weatherized buildings may also be eligible for renewable energy technologies including solar and heat pump technology (including necessary collateral activities) utilizing Public Benefit funding, provided that the agency submits a scope of work (including a budget) and receives prior approval from the Division before proceeding. Building units must be served by a participating Public Benefits utility.
3.6	Deferral of Weatherization Services	<p>Weatherization Readiness Funds, DOE, PB, LIHEAP, New WPN 23-4 replaces WPN 22-6. Funds can be used on Formula and BIL jobs to address deferrals.</p> <p>Major measures declined by the owner shall result in deferral of the job, reference to WPN 23-6.</p> <p>Repairs (per measure type) greater than \$1,000 shall result in the deferral of a job. Deferral items shall be addressed using Weatherization Readiness Funds.</p> <p>Replace, repair, or install primary heating systems when existing primary heating systems are unsafe, inoperable, or nonexistent. No home may be left without a safe primary heating system after weatherization where climate conditions require heating (i.e., all climate zones except zone 1 as defined by ASHRAE). If unable to meet this requirement, deferral is required.</p>
3.6.1	Deferral Notification Requirements	A notification letter is not required to be sent to the customer when plans are to use repair or Weatherization Readiness Funds to address the

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		reason(s) for deferral; however, the building shall be placed in deferral status until weatherization work is able to begin and all repairs have been completed.
3.9.1	Owner Contributions	Documentation to substantiate the lower SIR (5-24 Unit Workbook worksheet that shows the calculations for any buydowns of measures) and owner's contribution documentation shall be uploaded to the job in the HE+ System. Re-run audits so there is not a conflict between 0.5 SIR measures and HE+ measure constraints that require >0.8. Owner contribution documentation shall be uploaded to the building file. See 8.4.4.
5.3.7	Training and Technical Assistance (T&TA)	<p>Comprehensive and Specific training: Agencies shall work to expend over 50% of the T&TA funds to comprehensive training for retrofit installers, crew leader, energy auditor and quality control inspector.</p> <p>Meal reimbursement rates shall conform to agency travel policies and shall not exceed rates established by the General Services Administration (GSA) for the location. Hotel rates shall not exceed the rate for the conference. Any travel expenses falling outside of the conference or the days immediately preceding and following are not reimbursable without a documented reason (i.e., Weather, flight delays).</p>
5.3.7.2	Contractor Training	T&TA funds may be used to train contractors participating in the program. The use of T&TA funds to reimburse contractors is limited to T&TA that supports the four Home Energy Professionals occupations (i.e., Retrofit Installer Technician, Crew Leader, Energy Auditor, and QCI). The T&TA plan must describe contractor T&TA activities and part of the procurement RFB.
5.3.7.3	Out-of-State Travel	Meal reimbursement rates shall conform to agency travel policies and shall not exceed rates established by the General Services Administration (GSA). Hotel rates shall not exceed the rate for the conference. Any travel expenses falling outside of the conference or the days immediately preceding and following are not reimbursable without a documented reason (i.e., Weather, flight delays). Hotel rates shall not exceed the rate for the conference. Any travel expenses falling outside of the conference or the days immediately preceding and following are not reimbursable without a documented reason (i.e., weather, flight delays).

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		Agencies shall have a board-approved out-of-state travel and reimbursement policy. The policy shall be submitted with the T&TA Planning Work Plan.
5.3.9	Average Cost Per Unit (ACPU)	\$8,009 for DOE BIL funded jobs \$8,250 for DOE Formula funded jobs
5.4.3	Final Program Review (Close-out Report)	Close-out Report is included when the Close-out Invoice is generated through the HE+ System. Guidance will be issued with an Informational Transmittal.
6.6	Procurement Method and Contract Cost	Serial contracting is the practice of issuing a series of smaller purchase orders to one or more vendors for the same (or very similar) commodity or service to avoid completing the more structured bid process that would be required if the acquisitions were completed as a single procurement.
8.2.5	Minimal Computer Equipment and Software	Office 365 to include Word, Excel, and Access Modern internet browser (Chrome, Edge, Firefox)
8.4.2	Weatherization Assistant Audits	A fuel price modifier for the Social Cost of Carbon (SCC) will be included for the four most common fuel types of natural gas, LP gas, fuel oil, and electricity. The inclusion of the SCC modifiers will effectively increase measure and cumulative SIRs for weatherization units.
8.4.2.1	General Rules for Data Entry into Weatherization Assistant Audits	Model all possible energy savings measures, especially shell insulation measures. Include all planned repairs and Health & Safety measures in the audit. Prior approval from the HE+ Help Desk is required prior to replacing the a-coil.
8.4.4	Modeling 5 to 24-Unit Buildings with Weatherization Assistant	Revised modeling policy for 5-24 unit buildings.
8.6.1.2	Mobile Home Attic Specifications	Model all ceiling/attic spaces for insulation. For enclosed cavities, model the maximum capacity that the space can accommodate. Add the amount of insulation that the energy audit specified.
8.6.3	Foundation/Floor Insulation General	Add the amount of insulation that the energy audit specified.
8.6.3.1	1 to 4-Unit Foundation/Floor	Choose from the options listed in the audit for modeling purposes. The audit will not compare between insulation type, so multiple runs of the audit may be

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	Insulation Specification	required. Add the type and amount of insulation that the energy audit specified.
8.7.1.2	Heating System Replacement	<p>Electric Heat to Cold-Climate Air-Source Heat Pump (ccASHP):</p> <ol style="list-style-type: none"> 1. Model conversion to ccASHP by selecting “Evaluate Replacement with Heat Pump”. Include only the percentage of heat that will be supplied by the new system. 2. The audit will model and combine savings for both heating and cooling when the building has existing cooling systems present. 3. System may be a mini-split or fully ducted. All costs must be included. 4. The percentage of the heating load being replaced should reflect when the replacement ccASHP may not provide adequate heat at lower temperatures. 5. In cases where there is no cooling system, customer is provided information about the potential increase in energy costs when the ccASHP is used for cooling. <ol style="list-style-type: none"> a. The annual combined heating and cooling annual operational costs shall be calculated with base electric price without the added SCC modifier to ensure a household’s energy burden does not increase when there was no existing cooling equipment in the building. 6. Prior approval from the HE+ Help Desk is required prior to installing a ccASHP.
8.7.1.3	Fuel Switching	The annual combined heating and cooling annual operational costs shall be calculated with base fuel prices without the added SCC modifier to ensure a household’s energy burden does not increase. This will be most important when a ccASHP is installed where there is no existing cooling equipment in the building.
8.7.1.4 (10) 8.7.1.5 (6) (a) 8.7.2.1 (2)	CSST Gas Line Bonding (1-4 Units) (Multifamily)	<p>When CSST is already present in the building and not correctly bonded, bond the gas piping system to the electrical ground in accordance with NEC 250.94 and 250.104 when completing work on the fuel supply for the heating system or water heater.</p> <p>Bonding of CSST gas lines shall meet NFPA 54 standards.</p> <p>(1-4 Unit) When no work on a fuel system, the agency may bond the existing CSST gas line.</p>

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		<p>(Multifamily) When existing CSST gas line is present and not correctly bonded, the agency may bond the gas line if not working on the fuel system.</p> <p>(1-4 Unit, Mobile Home, and Multifamily) When no fuel system work will be completed, the agency may bond existing CSST gas line.</p>
8.7.3.1	1 to 4-Unit and Mobile Home Water Heater Replacement Specifications	<p>Heat Pump Conversions: Model water heater conversion from electric to heat pump, LP to heat pump, or oil to heat pump as an energy conservation measure when the following conditions are met:</p> <ol style="list-style-type: none"> 1. The customer agrees to the conversion and is willing to complete required maintenance. 2. If the existing electric water heater is load controlled (time of use), the agency shall contact the HE+ Help Desk for approval prior to proceeding. <p>Model for peak daily demand:</p> <ol style="list-style-type: none"> 1. Power vented shall have a minimum .70 UEF. An indirect water heater working with a high-efficiency boiler system. 2. A heat pump water heater with a UEF of 3.3 or greater.
8.7.3.2	Multifamily Water Heater Replacement Specifications	<ol style="list-style-type: none"> a. Power vented shall have a minimum .70 UEF. An indirect water heater working with a high-efficiency boiler system. b. A heat pump water heater with a UEF of 3.3 or greater.
8.7.4	Cooling Replacement Modeling	<p>Model central air conditioners or room air conditioners as an energy conservation measure with the audit based on the criteria listed in the specifications. All replacement systems shall meet the minimum Wisconsin Weatherization Material Specifications, as specified in Appendix C. The specifications are available on the HE+ TTA website under Weatherization Procurement.</p>

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8.7.4.1	Modeling Replacement Cooling Systems	<p>Central or room air conditioners:</p> <ol style="list-style-type: none"> Model replacement in the energy audit to determine approximate estimated savings based on default efficiency and cost entered in Setup Library. Enter pre- and post-cooling loads from audit results, pre- and post-efficiencies, and percent of cooling load supplied in cooling system replacement worksheet to calculate trued-up estimated savings. Un-check modeling of the replacement in the cooling tab and enter trued-up savings as an itemized cost record in the audit with actual costs. Prior approval from the HE+ Help Desk is required before proceeding with the installation of cooling systems. <p>Room air conditioners with replacement of electric baseboard heat.</p> <p>NEAT combines savings for both heating and cooling savings when the baseboard heat is modeled for replacement with a ccASHP. Contact the HE+ Help Desk for further guidance when considering replacing both electric heat and cooling.</p>
8.10	Weatherization Readiness Funds (WRF)	ZZ Repair codes, all fund sources, max of \$6,000 per unit per fund source unless prior Division approval. Use of all Readiness Funds DOE, PB, LIHEAP requires a deferral status in the HE+ System, 1-4 units only, no mobile homes.
8.10.1	Weatherization Readiness Funded Repairs: ZZ Repair Codes	All repair measures >\$1,000 shall be modeled using ZZ measure codes in the Weatherization Assistant Itemized Cost tab and NOT included in the SIR (see Weatherization Assistant Guide 4.5 Itemized Costs on the HE+ TTA website under Weatherization Manuals & Guides). Report the repair costs under the appropriate Repair category in the HE+ System (see Appendix D).
8.11	Work Order	A comprehensive work order shall be created that details all results from the completed energy audit to be included in the scope of work to be completed. The scope of work should include specifications such as R-value to be installed or efficiency of mechanical equipment to be installed. Crews and contractors shall be instructed to follow installation standards in the WI

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		<p>Weatherization Field Guide and/or the SWS, local while following local and national codes.</p> <p>The funding source and type of work for reporting purposes shall follow guidance provided in Appendix D when reporting completed work.</p>
9.1.3	Worker Safety (Health & Safety Training and Certification Report)	The report provides a listing of agency staff that have completed program-required health and safety trainings. The report also provides a listing of agency Asbestos and Lead Company certifications. The report is used by the Division to confirm Health and Safety training requirements during the annual Administrative Review. The agency shall report staff training and certifications in the database within 10 business days of receiving the training.
9.2	Radon and Weatherization	Air-tight seal on sump pits or ventilation, see Field Guide for more details.
Appendix C	Wisconsin Weatherization Material Specifications	Changes to align with WPN 23-6.
Appendix C Section 5	Additional Minimum Requirements for Replacement Mechanical Equipment	<p>Mini Split Heat Pump ≥ 10 HSPF2 ≥ 22 SEER2 <30K Capacity</p> <p>Mini Split Heat Pump ≥ 9.5 HSPF2 ≥ 20 SEER2 ≥ 30K Capacity</p> <p>Heat Pump ≥ 9.5 HSPF2 ≥ 18 SEER2 <40K Capacity</p> <p>Heat Pump ≥ 9 HSPF2 ≥ 17 SEER2 ≥ 40K Capacity</p>
Appendix C	Cooling Systems: 1 to 4-Unit Buildings (all sizes)	Air Conditioner ≥ 22 SEER2
Appendix C	Water Heaters: Mobile Homes	<p>Gas: 30 gallons ≥ 60 UEF</p> <p>Gas: 40 gallons ≥ 59 UEF</p> <p>Gas: 50 gallons ≥ 57 UEF</p> <p>Electric: 30 to 50 gallons ≥ 93 UEF</p>
Appendix C	Water Heaters: 1 to 4-Unit Buildings	<p>Gas: 30 to 50 gallons $\geq .70$ UEF</p> <p>Power vented. Natural vent allowed for Health & Safety replacements of leaking water heaters with no draft issues; commercially available.</p> <p>First Hour Rating ≥ 51 GPH</p> <p>Electric: 30 to 50 gallons $.93$ UEF</p>

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Appendix C	Water Heaters: 5+ Unit Buildings	Gas: 30 to 50 Gallons $\geq .70$ UEF Electric: 30 to 50 gallons $\geq .93$ UEF
Appendix C	Water Heaters: 5+ Unit Buildings	Integrated Heat Pump Water Heater ≥ 3.3 UEF First Hour Rating ≥ 45 GPH
Appendix C	Water Heaters: 5+ Unit Buildings	Integrated Heat Pump Water Heater – 120Volt/15 Amp ≥ 2.2 UEF