

U.S. Department of Energy
Weatherization Assistance Program (WAP)
WEATHERIZATION ANNUAL FILE WORKSHEET
Grant Number: EE0009940, State: WI, Program Year: 2024
Recipient: STATE OF WISCONSIN

IV.1 Subgrantees

Subgrantee (City)	Planned Funds/Units
Advocap Inc (Fond du Lac)	\$48,581.00 0
Ashland County Housing Authority (Mellen)	\$1,979,356.00 224
CAP Services Inc (Stevens Point)	\$38,434.00 0
Central Wisconsin CAC (Wisconsin Dells)	\$37,960.00 0
Community Action of Rock/Walworth Counties (Janesville)	\$47,314.00 0
Couleecap Inc (Westby)	\$42,620.00 0
Hartford Community Development Authority (Hartford)	\$20,368.00 0
La Casa de Esperanza (Waukesha)	\$3,723,582.00 404
Newcap Inc (Oconto)	\$76,356.00 0
North Central CAP Inc (Wisconsin Rapids)	\$84,683.00 0
Outagamie County Housing Authority (Appleton)	\$27,659.00 0
Partners for Community Development (Sheboygan)	\$3,101,051.00 336
Project Home (Madison)	\$39,117.00 0
Racine/Kenosha CAA (Racine)	\$75,315.00 0
Southwest Wisconsin CAP (Dodgeville)	\$20,467.00 0
West Central Wisconsin CAA (Glenwood City)	\$63,084.00 0
Western Dairyland EOC (Independence)	\$43,470.00 0
Total:	\$9,469,417.00 964

IV.2 WAP Production Schedule

Weatherization Plans		Units
Total Units (excluding reweatherized)		916
Rewaterized Units		48
Average Unit Costs, Units subject to DOE Project Rules		
VEHICLE & EQUIPMENT AVERAGE COST PER DWELLING UNIT (DOE RULES)		
A	Total Vehicles & Equipment (\$5,000 or more) Budget	\$0.00

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B	Total Units Weatherized	916
C	Total Units Reweatherized	48
D	Total Dwelling Units to be Weatherized and Reweatherized (B + C)	964
E	Average Vehicles & Equipment Acquisition Cost per Unit (A divided by D)	\$0.00
AVERAGE COST PER DWELLING UNIT (DOE RULES)		
F	Total Funds for Program Operations	\$6,697,138.00
G	Total Dwelling Units to be Weatherized and Reweatherized (from line D)	964
H	Average Program Operations Costs per Unit (F divided by G)	\$6,947.24
I	Average Vehicles & Equipment Acquisition Cost per Unit (from line E)	\$0.00
J	Total Average Cost per Dwelling (H plus I)	\$6,947.24

IV.3 Energy Savings

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

	Units	Savings Calculator (MBtus)	Energy Savings
This Year Estimate	964	N/A	18373 *
Prior Year Estimate	1043	N/A	21200 *
Prior Year Actual	954	N/A	0 *

* Energy Savings values were manually entered.

Method used to calculate savings description:

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

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

Program Year	Estimate (Other/SES)		Actual	
	Units	Savings (MMBtus)	Units	Savings (MMBtus)
2024-2025	964	18,373		
2023-2024	1,043	18,974		
2022-2023	1,046	21,744	943	17,702
2021-2022	1,024	21,900	1055	21,958
2020-2021	1,118	23,911	1020	20,436
2019-2020	1,068	25,286	1021	20,394

PY24 savings estimates (for homes that do not yet have post-weatherization history) are projections based on the measures installed and the statistical model of energy savings validated by data from PY23 and earlier. The savings are directly calculated from natural gas and electric utility billing data for PY19 through PY23. All billing data is weather normalized to account for the effect of year-to-year temperature variation on household energy use. The reference fuel price for natural gas is a seven-year average of the previous historical five years plus two future years. The reference price for electricity uses the previous calendar year average.

Energy savings, based on Wisconsin's 2023 Self Evaluation Savings (SES) study are projected to average 148 heating therms, or 14% per household and 994 baseload kilowatt hours (kWh), or 12% per household. Based on the fuel costs used in Wisconsin's Weatherization Assistant for the planned 964 weatherized units in Wisconsin using DOE funds are projected to be 18,373 MMBtus annually, amounting to \$8.64 million Net Present Value (NPV) over the approximate 20-to-30-year life of the weatherization measures installed. The following calculations are based on Wisconsin Assessment of Energy and Cost Savings for Homes Treated under Wisconsin's Home Energy Plus Weatherization Program 2024.

Fuel Prices for Weatherization Modeling

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

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used in Weatherization Assistant.

Base-Year Price Identification

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

Electric

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

Fuel Oil and Propane (L.P.)

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

Natural Gas

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

Fuel-Price-Change Indexing

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

The Division will use the base-year prices for Program Year 2024-2025 with the first full year of energy savings encompassing the heating season of 2025-2026 (i.e., the first full winter after weatherizing).

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

Fuel Cost Methodology

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

Price Indices Methodology

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

Annual Updates Procedures

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

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

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

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

IV.4 DOE-Funded Leveraging Activities

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

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

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

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

Non-DOE funded units are reported as leveraged units.

IV.5 Policy Advisory Council Members

Check if an existing state council or commission serves in this category and add name below

Brad Rose	Type of organization: Unit of State Government Contact Name: Phone: 6082679491 Email: bradley.rose@wisconsin.gov
Eric Schrader	Type of organization: Utility Contact Name: Phone: 3122403609 Email: eric.schrader@peoplesgasdelivery.com
Gary France	Type of organization: Other Contact Name: Gary France Phone: 7153591075 Email: gary@francepropane.com
James Fjorden	Type of organization: Utility Contact Name: Phone: 6512821534 Email: James.L.Fjorden@xcelenergy.com
Jamie Her	Type of organization: Unit of Local Government Contact Name: Phone: 6082407400 Email: Her.Jamie@countyofdane.com
Jason VanderVelden	Type of organization: Local agency Contact Name: Phone: 9204260150 Email: jason.vandervelden@advocap.org
	Type of organization: Unit of Local Government

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Jennifer Fischer	Contact Name: Jennifer Fischer Phone: 6082407460 Email: fischer@countyofdane.com
Karin Kirchmeier	Type of organization: Non-profit (not a financial institution) Contact Name: Phone: 9204592780101 Email: karin@partners4cd.com
Maricela Gaona	Type of organization: Unit of Local Government Contact Name: Maricela Gaona Phone: 4144696435 Email: maricela.gaona@milwaukeeccountywi.gov
Mitch Lederman	Type of organization: Utility Contact Name: Phone: 6082527388 Email: mlederman@mge.com
Molly Calderon	Type of organization: Non-profit (not a financial institution) Contact Name: Molly Calderon Phone: 2626522170 Email: molly.calderon@umos.org
Rose Strege	Type of organization: Indian Tribe Contact Name: Phone: 7157934862 Email: Rose.Strege@mohican-nsn.gov
Sarah Schroeder	Type of organization: Non-profit (not a financial institution) Contact Name: Sarah Schroeder Phone: 6082463444 Email: schroeder@eri-wi.org
Tim Heinrich	Type of organization: Utility Contact Name: Phone: 6088372263 Email: theinrich@meuw.org
Timothy Bruer	Type of organization: Non-profit (not a financial institution) Contact Name: Timothy Bruer Phone: 6082837678 Email: tbruer@esiwi.com
Todd Stuart	Type of organization: Non-profit (not a financial institution) Contact Name: Todd Stuart Phone: 6084415740 Email: tstuart@wieg.org
Tom Content	Type of organization: Non-profit (not a financial institution) Contact Name: Tom Content Phone: 6089578982 Email: content@cubwi.org
Tom Mayne	Type of organization: Local agency Contact Name: Tom Mayne Phone: 6087976006 Email: tom.mayne@couleecap.org
Veronica Stober	Type of organization: Utility Contact Name: Phone: 6414375362 Email: veronicastober@alliantenergy.com

IV.6 State Plan Hearings (Note: attach notes and transcripts to the SF-424)

Date Held	Newspapers that publicized the hearings and the dates the notice ran
04/03/2024	The public hearing notice was published in the Wisconsin State Journal on March 22, 2024. The public hearing notice was also distributed to Weatherization Assistance Program and Wisconsin Home Energy Assistance Program Grantees in a Division broadcast informational transmittal on March 22, 2024. The public hearing was held on April 3, 2024 as a Telephonic Public Hearing at 10:00 am. The Public Hearing notice is included as Attachment 2, transcript is included as Attachment 3 of this submittal.

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IV.7 Miscellaneous

Recipient Business Officer

Name: Jeff Heino, Weatherization Program and Policy Chief

E-mail: jeff.heino@wisconsin.gov

Phone: 608-264-8801

Recipient Principal Investigator

Name: Kris Haskin

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Policy Advisory Council Meeting

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

A LIEAC meeting will be conducted April 03, 2024, to obtain approval of the plan. Meeting minutes are included as Attachment 1.

Selection of Subgrantees

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

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

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

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

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

It is Wisconsin's intent to allocate either Bipartisan Infrastructure Legislation (BIL) funding OR DOE Formula funding received under this plan to the network. Current BIL production is 1,247 units as of the last approved Quarterly Performance Report, 12/31/23. All agencies will receive Weatherization Readiness Funding allocated under this plan. Those agencies with unit goals listed above will receive the formula funding and those without unit goals will receive BIL funding. Wisconsin's rationale for this approach is twofold: It allows agencies to demonstrate success in spending and production for both fund sources and allows compliance with the DOE directive prohibiting the comingling of BIL and DOE formula for the same activities. From a total funding standpoint, each subgrantee received an increase in funding over their base funding from last year. Wisconsin is aware and has taken care to address any funding disparity in the allocation process.

Subgrantees have been provided with opportunities to speak and address any funding concerns directly to the Division. This concept was well received by the network and has been successful in regard to production and expenditure goals. No comments in opposition were received at the 2023 public hearing and

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Wisconsin's Policy Advisory Committee was also supportive of this approach.

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

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

The framework for the funding structure is as follows:

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

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

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

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

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