

# Developing Weatherization Guidelines and Monitoring

Division of Energy Assistance  
Office of Community Services  
Administration for Children & Families  
U.S. Department of Health and Human Services



ADMINISTRATION FOR  
**CHILDREN & FAMILIES**

# Agenda

- Weatherization Activity (Take a Stand)
- Key Takeaways
- Brenda Ilg - Wyoming WAP
- Summary



# Weatherization (Take a Stand)

This section reviews key information about Weatherization programs.

# Weatherization (Take a Stand)

- Read the question.
- Stand up if the answer is A.
- Stay sitting if the answer is B.



# Question 1

What is the maximum percentage of the LIHEAP grant that can be allocated for Weatherization without a waiver?

A. 15 percent

Answer: A. 15 percent

B. 25 percent

**Answer**

## Question 2

One of the criteria that must be met to increase the Weatherization spending to 25 percent is as follows: “The total dollars of LIHEAP heating, cooling, and crisis assistance benefits received by the grantee’s service population that are provided from the federal LIHEAP allotments from regular and supplemental appropriations will not be less than the combined total amount received in the preceding year.”

A. True

Answer: A. True

B. False

**Answer**

## Question 3

Should the money committed to another unit of government for LIHEAP Weatherization be considered obligated?

A. Yes

Answer: A. Yes

B. No

**Answer**

## Question 4

Are funds transferred to the DOE agency with a requirement to use LIHEAP financial eligibility guidelines (150 percent of the federal poverty level)?

A. Yes

Answer: B. No

B. No

**Answer**



## Question 5

Should your program consider the LIHEAP Weatherization transfer agency to be a “subrecipient” of your LIHEAP funds?

A. Yes

Answer: A. Yes

B. No

**Answer**

## Question 6

Administrative monitoring of the Weatherization agency can be accomplished just by reviewing case files.

A. True

Answer: B. False

B. False

**Answer**

## Question 7

Since DOE requires extensive monitoring, does the LIHEAP grantee need to do any additional monitoring of the LIHEAP Weatherization transfer?

A. Yes

Answer: A. Yes

B. No

**Answer**

## Question 8

What are some materials that should be reviewed when monitoring a LIHEAP weatherization case file?

A. Eligibility documentation, Household make up, work order, and cost associated with work.

Answer: A. Eligibility documentation, Household make up, work order, and cost associated with work.

B. Subrecipient's risk assessment, total program expenditure, and fund obligations

**Answer**

## Question 9

Generally, a DOE unit may re-weatherized if originally weatherized before when?

A. 1994

Answer: A. 1994

B. 1998

**Answer**

## Question 10

Does DOE allow work on multifamily residential buildings even if some of the tenants are not eligible?

A. Yes

Answer: A. Yes

B. No

**Answer**

# Question 11

Can LIHEAP Weatherization funds be used to make repairs to a unit that are not strictly Weatherization measures?

A. Yes

Answer: A. Yes

B. No

**Answer**

## Question 12

Can LIHEAP Weatherization funds be used to replace old or inoperable household appliances with new energy-efficient ones (e.g., a gas cook stove)?

A. Yes

Answer: A. Yes

B. No

**Answer**



## Question 13

Is there a requirement that LIHEAP Weatherization funds be used to give clients a priority in a crisis situation?

A. Yes

Answer: B. No

B. No

**Answer**

# Winner(s)



# Key Takeaways

- **The LIHEAP grantee determines the specific rules and regulations that will govern use of LIHEAP funds for weatherization.**
  - **Option 1:**  
Use LIHEAP funds under the same rules and guidelines as you would use DOE funds.
  - **Option 2:**  
Use primarily DOE rules, but with certain exceptions.
  - **Option 3:**  
Use LIHEAP exclusively LIHEAP rules – where LIHEAP Grantee must design their own LIHEAP weatherization program

# Key Takeaways (continued)

- A maximum of 15 percent of the LIHEAP grant can be spent on Weatherization without a waiver.
- The spending can be increased to 25 percent with a waiver, if the conditions are met.
- LIHEAP Grantees are required to monitor LIHEAP weatherization funds
- LIHEAP grantees should “piggy/back” on the DOE agency’s monitoring
- LIHEAP independent monitoring of case files should include a random sample of LIHEAP Weatherization case files.

# Key Takeaways (continued)

- Statute Citation: Section 2605(k) (42 U.S.C. § 8624(k))
  - LIHEAP funds “may be used by the State for low-cost residential weatherization or other energy-related home repair for low-income households, particularly those low-income households with the lowest incomes that pay a high proportion of household income for home energy.”



# Department of Energy (DOE)

# Option 1: 100% DOE

When LIHEAP follows 100% DOE:

- Whole-House Energy Audit
- Measures must be justified by the audit or included in Appendix A.
- Measures installed to Standard Work Specifications (SWS)
- Final Inspection/Quality Control Inspection (QCI)
- Training

# Option 2: DOE with Exception

- When clarified in LIHEAP Model Plan:
  - Funds can be allocated for other activities not necessarily justified by the audit or included in Appendix A – examples below:
    - House repairs beyond the allowable incidental repairs identified in DOE policy
    - replacing stand-alone freezers
    - health and safety activities that if not accomplished might result in a deferral, etc. Heating system replacements that do not meet DOE guidelines for Health & Safety (H/S) or energy conservation measures (ECMs)
    - Health & Safety measures not allowed in Weatherization Program Notice 11-6, such as cook stove replacements
    - Grantees can choose to deviate from ventilation requirements
    - QCI inspection requirement



# Wyoming WAP

Brenda ILG

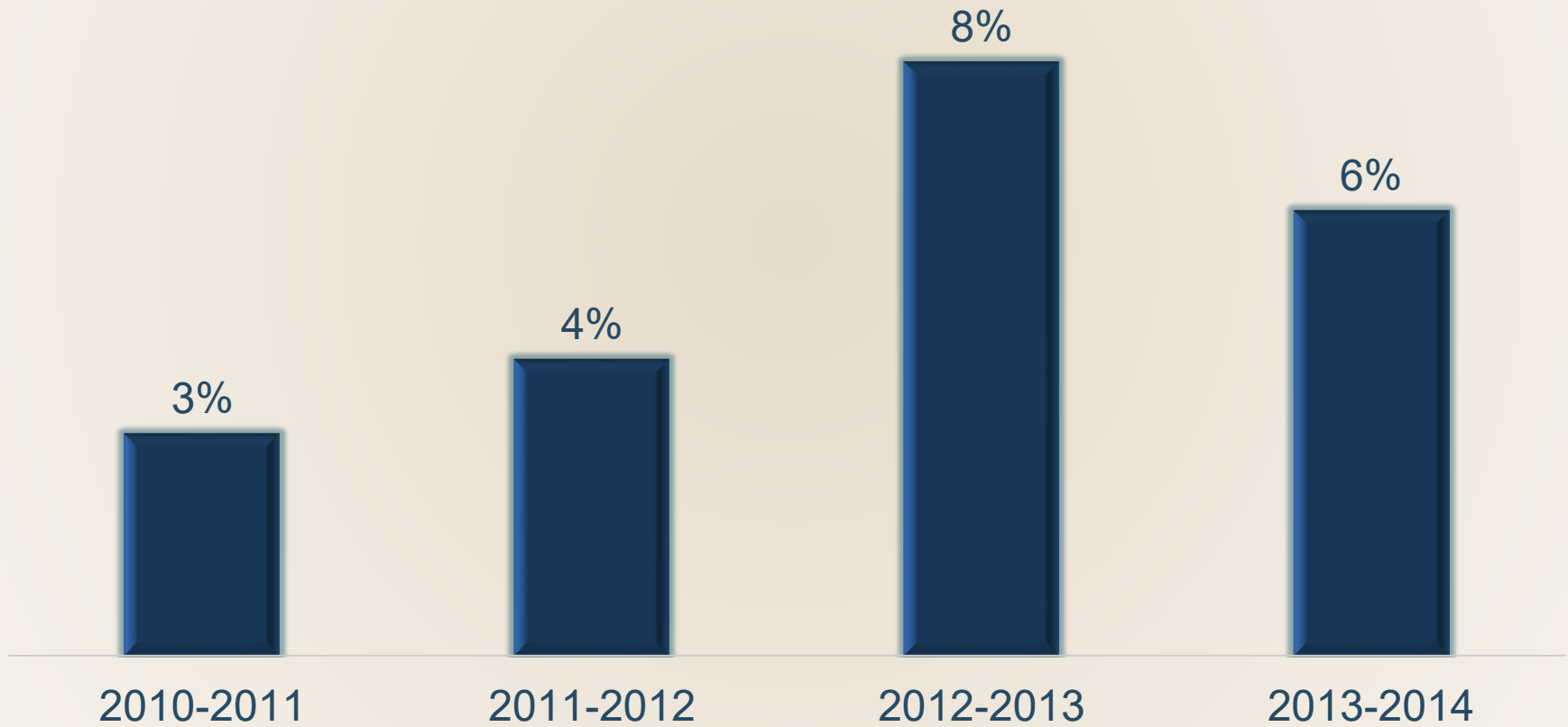
*Program Manager, LIHEAP and WAP*

*Wyoming Family Services*



# Need Exceeds Available Funds

Percent Of Approved Households Weatherized

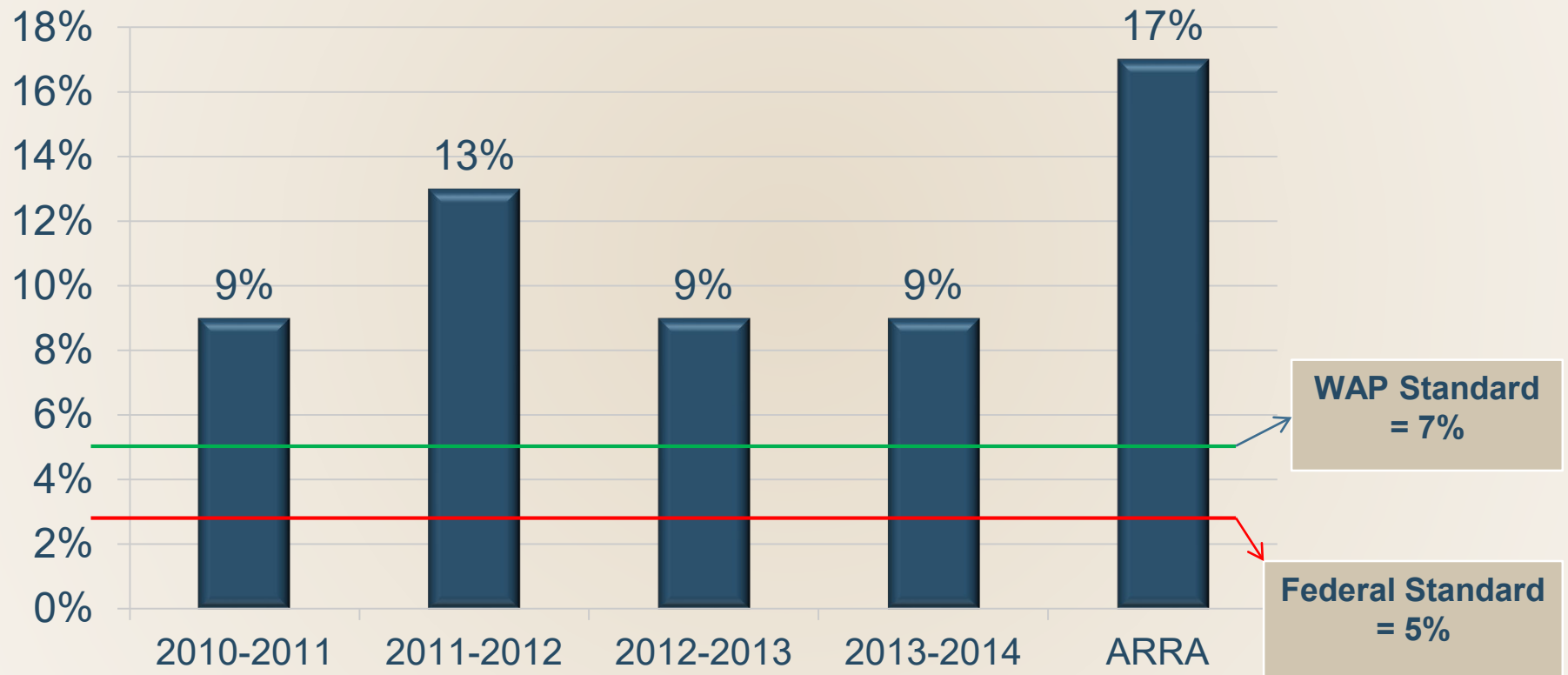


# Key Elements

- Task Groups = subgrantee and state representation
- Robust standardized monitoring
- On-site and in-progress assessments/inspections
- Management by windshield
- Safety committee and safety newsletter
- Quarterly meetings
- Annual WAP training
- Standardized forms and client files
- Accessibility

# Combined Contract/Ilg Inspection %

Combined % Inspected



# Wyoming LIHEAP/WAP Exceptions

- Health and Safety allowances



# Contact

Brenda ILG

*Program Manager, LIHEAP and WAP*

*Wyoming Family Services*

Brenda.ilg@wyoming.gov

307-247-6181, Ext. 34



# Questions?

