

**U.S. Department of Energy
WEATHERIZATION ASSISTANCE PROGRAM (WAP)
WEATHERIZATION ANNUAL FILE WORKSHEET**

(Grant Number: EE0009908, State: MA, Program Year: 2022)

IV.1 Subgrantees

Subgrantee (City)	Planned Funds/Units
Action for Boston Community Development (Boston)	\$734,975.00 115
ACTION, Incorporated (Gloucester)	\$743,325.00 105
Berkshire Community Action Council Inc. (Pittsfield)	\$291,095.00 43
Citizens for Citizens (Fall River)	\$691,820.00 108
Community Action Pioneer Valley (Greenfield)	\$395,900.00 60
Community Action Programs, Intercity (Chelsea)	\$697,985.00 109
Greater Lawrence Community Action Council Inc. (Lawrence)	\$629,675.00 95
Housing Assistance Corporation (Hyannis)	\$272,600.00 40
Quincy Community Action Programs (Quincy)	\$450,890.00 66
South Middlesex Opportunity Council (Framingham)	\$972,787.00 108
Springfield Partners in Community Action (Springfield)	\$673,325.00 105
Worcester Community Action Council (Worcester)	\$691,325.00 105
Total:	\$7,245,702.00 1,059

IV.2 WAP Production Schedule

Planned units by quarter or category are no longer required, no information required for persons.	
Weatherization Plans	Units
Total Units (excluding reweatherized)	1,027 1,027
Rewatherized Units	32 32
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
B Total Units Weatherized	1,027
C Total Units Reweatherized	32
D Total Dwelling Units to be Weatherized and Reweatherized (B + C)	1,059
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	\$5,003,775.00
G Total Dwelling Units to be Weatherized and Reweatherized (from line D)	1,059
H Average Program Operations Costs per Unit (F divided by G)	\$4,725.00

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I Average Vehicles & Equipment Acquisition Cost per Unit (from line E)	\$0.00
J Total Average Cost per Dwelling (H plus I)	\$4,725.00

IV.3 Energy Savings

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

	Units	Savings Calculator (MBtus)	Energy Savings
This Year Estimate	1059	29.3	31029
Prior Year Estimate	1044	29.3	30589
Prior Year Actual	45	29.3	1318

Method used to calculate savings description:

Massachusetts used DOE's recommended 29.3 Mbtu's per weatherized unit to determine estimated energy savings.

In order to increase energy savings from the WAP while the DOE average cost per unit is reduced, DHCD will focus on:

- Maximizing Subgrantee access to utility energy efficiency programs which will increase the amount of funds available, thus making certain that Subgrantees are able to provide comprehensive energy efficiency services;
 - Continuing with Subgrantee Energy Auditor, QCI, and WAP contractor technical training with priority given to cost-effective blower door directed air sealing, including zonal pressure diagnostics and high density insulation techniques, as well as continued efforts at improving the quality of work;
 - Continuing with heating system improvements facilitated by alternative funding sources such as DHCD's HEARTWAP, as well as utility funds.

IV.4 DOE-Funded Leveraging Activities

During FY 1994, DHCD developed a statewide strategy to accomplish its leveraging goals. A solicitation for leveraging proposals was made during the 1994 program year. Action, Inc. was selected to represent the Subgrantee network. DHCD intends to continue this relationship into FY 2022 through an award of \$70,000 to Action Inc. to facilitate and continue its very successful efforts at leveraging non-federal funding for the WAP network.

DHCD continues to expand the capacity of the WAP Subgrantee providers to leverage non-public resources in order to facilitate the weatherization of additional low-income dwellings. These leveraging activities will be limited to the provisions contained under Section 142 of the Energy Policy Act of 1992, and may include:

- Training management and technical staff in the coordination and integration of utility and federal resources;
- Intervention and expert testimony on behalf of the low-income rate payer at utility rate case hearings, to include review of demand side management and low-income energy efficiency plans;
- Advocacy on behalf of the low-income rate payer with the Massachusetts Energy Efficiency Advisory Council (EEAC);
- Continued contact with the investor-owned utility industry and the private energy service company network;
- Continued negotiation with municipally-owned utilities with an emphasis on those with a high percentage of low-income households;
- Actively pursuing and coordinating out-of-network funding opportunities that may help address reasons for weatherization deferrals of low-income households;
- Actively pursuing the creation of a unified audit and reporting protocol to facilitate the administration of multiple utility reporting requirements.

The WAP network in Massachusetts currently administers utility-funded Demand Side Management (DSM) programs that provide full-scale weatherization, similar in scope to DOE WAP, as well as Appliance Management Programs (AMPs) that provide low-income households with both client education and efficiency upgrades of LED lighting as well as high use electric appliances such as refrigerators, freezers, washing machines, dehumidifiers, and air conditioners. In addition, coordinated with the DOE WAP, is the LIHEAP-funded Heating Emergency Assistance Retrofit Task Weatherization Assistance Program (HEARTWAP) administered by DHCD which offers repair, replacement, and maintenance services for non-functional or inefficient heating systems. Under Massachusetts regulations, investor-owned electric utilities provide full-scale building shell improvements and heating system replacement services to non-electric heat customers. The WAP network also has access to funding for very limited WAP related repair measures.

During Calendar Year 2020, the WAP Network in Massachusetts leveraged approximately \$31,774,903 million for use in DSM, AMPs, and heating system programs for single and small multi-family income eligible dwellings. A total of 11,195 leveraged households were served.

DHCD estimates that combined program funding for the DOE WAP, HEARTWAP, and low-income single-family 1-4 unit utility rate-payers will

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serve approximately 15,000-20,000 households with some type of energy efficiency or heating system service over the next year.

Additionally, the Massachusetts WAP Subgrantee network, through the Low-Income Energy Affordability Network (LEAN), administers an additional \$35+ million per year in utility-funded activities in a Low-Income Multi-Family Program targeting high use income-eligible multi-family buildings. Additional information about that program can be found here: <http://leanmultifamily.org/>

No utility funds are utilized or budgeted by DHCD. All funds are contracted by the Massachusetts utilities directly to local WAP/LIHEAP agencies. The \$70,000 provided by DHCD is an amount sufficient to allow LEAN to achieve the above referenced leveraging activities through research and preparation as well as physically attending relevant meetings. The \$70,000 of \$8,040,682 equates to 0.87% of the total grant award. It is a minimal amount of the maximum 15% that could be allocated for leveraging.

DHCD reports leveraged units in the leveraged funds section of the annual T&TA/Monitoring/Leveraging report. DHCD does not report leveraged units in each QPR as we conduct a calendar year leveraging report annually of each Subgrantee during the 4th quarter of the WAP Program Year.

IV.5 Policy Advisory Council Members

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

Braintree Electric Light Department	Type of organization: Utility Contact Name: Ms. Ruth Slater Phone: 7813482353 Email: rslater@beld.com
Low Income Energy Affordability Network (LEAN)	Type of organization: Non-profit (not a financial institution) Contact Name: Mr. Elliott Jacobson, VP Energy Programs Phone: 9782814040 Email: elj@actioninc.org
MA Department of Energy Resources	Type of organization: Unit of State Government Contact Name: Ms. Alissa Whiteman Phone: 6176267313 Email: alissa.whiteman@mass.gov
MA Department of Public Utilities	Type of organization: Unit of State Government Contact Name: Ms. Theresa Kelly Phone: 6173053500 Email: theresa.kelly@mass.gov
MA Executive Office of Elder Affairs	Type of organization: Unit of State Government Contact Name: Ms. Marylouise Gamache Phone: 6177277750 Email: marylouise.gamache@mass.gov
MA Office on Disabilities	Type of organization: Unit of State Government Contact Name: Mr. Jeff Dougan Phone: 6177277440 Email: jeff.dougan@mass.gov
Massachusetts Energy Director's Association	Type of organization: Non-profit (not a financial institution) Contact Name: Mr. Peter Wingate Phone: 4137742318 Email: Pwingate@communityaction.us
National Consumer Law Center	Type of organization: Non-profit (not a financial institution) Contact Name: Mr. Charles Harak Phone: 6175428010 Email: charak@nclc.org
National Grid	Type of organization: Utility Contact Name: Ms. Amanda Formica, Analyst, Customer Energy Management Phone: 7819075851 Email: amanda.formica@nationalgrid.com
NStar Electric	Type of organization: Utility Contact Name: Ms. Marge Kelly, Senior Energy Efficiency Consultant Phone: 7814413895 Email: margaret.kelly@eversource.com

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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

01/21/2022 The Notice of Open Meeting/Public Hearing was posted on DHCD's website on January 7, 2022. The weblink is: <https://www.mass.gov/doc/notice-of-open-meeting-for-fy2022-doe-wap-public-hearing/download> Notifications were also sent to the MA. Secretary of State's Office and the Executive Office of Administration and Finance.

IV.7 Miscellaneous

The Massachusetts Department of Housing and Community Development's (DHCD) Recipient Business Officer is: Mr. Bryan Adams, Chief Financial Officer; bryan.j.adams@mass.gov; (617) 573-1270. The Recipient Primary Investigator is: Eric Beaton, Supervisor, Energy Conservation Unit; eric.beaton@mass.gov; (617) 573-1428.

For PY 2022 budget development, DHCD will follow DOE guidance in WPN 21-2 and budget according to the award of \$8,040,682. Because of the current Continuing Resolution and DOE's instructions, DHCD informed all Subgrantees of the budget plan (based on WPN 21-2) at both the WAP preliminary planning meeting for the State Plan on 12/21/2021 as well as the WAP Public Hearing on 1/21/2022. During these meetings, DHCD informed the Subgrantee network that once the final budget allocation is received from DOE via WPN 22-2, DHCD will revise the budget allocations.

DHCD has also reminded all Subgrantees that a redistribution provision exists where DHCD may opt to shift funds as necessary in order to fully expend WAP funds during the budget period. DHCD has already included in each executed contract with Subgrantees language that addresses the specific purpose of this provision. At this time, DHCD does not see the need to shift units on a quarterly basis from low-producing Subgrantee agencies to high-producing Subgrantee agencies.

The Massachusetts WAP Policy Advisory Council (PAC) typically meets 2-3 times during the year. The WAP PAC convened for meetings on 8/5/2021 and 1/11/2022. The meeting on 1/11/2022 discussed the 2022 State Plan, existing program year production, additional WAP grant opportunities, and other WAP related matters. Input from the PAC membership is solicited and welcomed regarding the development and implementation of policies and procedures, as well as technical standards in coordinating the DOE WAP with utility-funded energy efficiency programs in Massachusetts. Members were provided a link to the draft State Plan and Public Hearing notice.

The DHCD Supervisor of the Energy Conservation Unit regularly meets with other Massachusetts energy-related outreach groups to provide updates and related information exchange regarding the WAP, as well as to solicit input and suggestions. Such groups include: Low-Income Energy Affordability Network (LEAN), Low-Income Best Practices Group (LIBP), LIHEAP Advisory Group, and the Massachusetts Energy Director's Association (MEDA).

The Massachusetts fringe rate used for the DOE WAP budget includes the U.S. Health and Human Services approved fringe benefits rate of 37.46% plus the approved payroll tax rate of 1.97%. Total fringe rate charged to employees salaries is 39.43%. This rate represents an increase from last year's State Plan when the rate was 38.32%.

The cost allocation plan posted by the Comptroller's office ([Statewide Cost Allocation Plan \(SWCAP\) - Office of the Comptroller \(macomptroller.org\)](#)) lists the FY 2019 statewide Cost Allocation Plan as the most recent. Typically this gets released between late March and July each year. Once the FY 2020 or FY 2021 Plan is released, DHCD will forward it to DOE. Likewise, the single audit and related management letter submitted as attachments to this State Plan are the most recent versions possessed by DHCD. When the new audit and management letter are received for the year ended June 30 2021, DHCD will submit them to DOE.

DHCD no longer utilizes print advertisements in newspapers to alert the public of the WAP Public Hearing. DHCD publishes an Open Meeting Notice to its website for the public to access. The current weblink to the January 21, 2022 WAP Public Hearing is: <https://www.mass.gov/service-details/dhcd-open-meeting-notices>

DHCD submitted our energy audit/priority list package to DOE on November 7, 2019. DHCD received conditional approval of the NEAT/MHEA audit package on June 8, 2020. As a result, DHCD decided to abandon the priority list of measures going forward. DHCD developed a NEAT/MHEA User's Guide, as well as a Massachusetts DOE WAP Energy Auditor / Quality Control Inspector Technical Manual. Both were submitted to DOE and have been reviewed with comments, and returned to DHCD for revisions.

During July 2021, DOE conducted a technical monitoring of Massachusetts' WAP where DOE examined energy audits from each WAP agency. The monitoring effort resulted in DHCD developing a Corrective Action Plan which will result in the Massachusetts WAP utilizing a "temporary Priority List of Measures" until such time as DOE approves our ability to begin using the NEAT/MHEA energy audit full-time again. The Massachusetts WAP network is currently being trained on how to use the temporary Priority List of Measures and associated standardized data collection forms.

Due to the COVID-19 pandemic, PY 2020 and PY 2021 will operate concurrently, but separate in terms of tracking and reporting. Both PY 2020 and PY 2021 will end on 3/31/2022. PY 2022 will begin an entirely new grant with DOE. There will be no carry-over funds into the new grant from the existing grant. The existing grant will be closed-out during the summer of 2022.

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The COVID-19 pandemic has required DHCD to develop several policies and procedures that ensure the safety of Subgrantee agency staff, contractors, clients, and DHCD field staff. These policies and procedures will continue for PY 2022 until such time as the pandemic no longer poses a public health threat as declared by the Massachusetts Governor's office. DHCD developed such materials as: Client Agreement to Proceed form (liability waiver); Client Screening Questions; Temporary COVID-19 Deferral of Services Notice form; and Infectious Disease Preparedness and Response Plan. DHCD also has required all Grantee Field staff, Subgrantee agency field staff, and contractors to complete required PPE training, so as to maximize the safety of all during weatherization work for as long as the pandemic lasts.

For PY 2022, DHCD will consider DOE's guidance to assign the highest priority to households with a high energy burden. DHCD will seek to refine the "priority points" structure for determining client eligibility. This change will need to be implemented in the software reporting system. This change is in line with the Massachusetts WAP's comprehensive approach to advancing equity for all, including those clients who have been historically underserved, marginalized, and/or adversely affected by persistent poverty and inequality.

DHCD formed a WAP Ad-Hoc Advisory Working Group which had its first meeting during the summer of 2021. The purpose of this Ad-Hoc Advisory Working Group is to discuss the functionality and implementation of the Massachusetts WAP. This is a temporary Working Group and it is anticipated that the Working Group will function into the early months of PY 2022.

One of the topic areas discussed by the WAP Ad-Hoc Advisory Working Group is the structure of the program as it relates to "subcontract agencies". Between September-November 2021, two (2) of the WAP subcontract agencies (LEO and NSCAP) decided to voluntarily abandon their WAP, HEARTWAP, and utility energy programs. In response to interest from within the network, DHCD is exploring procurement options during PY 2022 to provide an opportunity for the remaining WAP subcontract agencies to be considered for "Lead agency" Subgrantee status, potentially beginning in Program Year 2023 (4/1/2023).

The Green Jobs Academy (GJA) is Massachusetts' weatherization training center, operated under South Middlesex Opportunity Council (SMOC). The GJA has recently re-located its training facility from Worcester to Marlborough, Massachusetts. The new space will afford GJA the ability to expand its physical resources as well as expand into a more "regional training center" for both New England WAP agencies as well as utility energy efficiency programs.

Lastly, DHCD's Energy Programs Coordinator retired on October 28, 2021. DHCD was able to hire a new Energy Programs Coordinator on December 21, 2021. The new hire comes from The Massachusetts Department of Energy Resources (DOER) where she has worked for the past 20+ years.