

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

(Grant Number: EE0007926, State: MA, Program Year: 2018)

IV.1 Subgrantees

Subgrantee (City)	Planned Funds/Units
Action for Boston Community Development (Boston)	\$658,585.00 111
ACTION, Incorporated (Gloucester)	\$664,235.00 101
Berkshire Community Action Council Inc. (Pittsfield)	\$257,135.00 41
Citizens for Citizens (Fall River)	\$624,175.00 105
Community Action Pioneer Valley (Greenfield)	\$354,630.00 58
Community Action Programs, Intercity (Chelsea)	\$629,910.00 106
Greater Lawrence Community Action Council Inc. (Lawrence)	\$563,620.00 92
Housing Assistance Corporation (Hyannis)	\$245,665.00 39
Quincy Community Action Programs (Quincy)	\$403,040.00 64
South Middlesex Opportunity Council (Framingham)	\$927,930.00 105
Springfield Partners in Community Action (Springfield)	\$601,235.00 101
Worcester Community Action Council (Worcester)	\$615,235.00 101
Total:	\$6,545,395.00 1,024

IV.2 WAP Production Schedule

Weatherization Plans	Units
Total Units (excluding reweatherized)	993
Rewatherized Units	31
Note: Planned units by quarter or category are no longer required, no information required for persons.	

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	993
C	Total Units Reweatherized	31
D	Total Dwelling Units to be Weatherized and Reweatherized (B + C)	1,024
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	\$4,838,400.00
G	Total Dwelling Units to be Weatherized and Reweatherized (from line D)	1,024
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	1024	29.3	30003
Prior Year Estimate	900	29.3	26370
Prior Year Actual	987	29.3	28919

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 2018 through an award of \$35,000 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;
- 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 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 lighting and high use electric appliances such as refrigerators and freezers. 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, maintenance, and replacement 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 2017, the WAP Network in Massachusetts leveraged approximately \$41 million for use in DSM, AMPs, and heating system programs for single and small multi-family income eligible dwellings. A total of 17,288 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 serve approximately 20,000 households with some type of energy efficiency or heating system service over the next year.

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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 \$35,000 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 \$35,000 of \$6,058,804 equates to .58% 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: Elliot Jacobson, VP Energy Programs Phone: 9782814040 Email: elj@actioninc.org
MA Department of Energy Resources	Type of organization: Unit of State Government Contact Name: Mr. Ian Finlayson Phone: 6176267313 Email: ian.finlayson@state.ma.us
MA Department of Public Utilities	Type of organization: Unit of State Government Contact Name: Ms. Nancy Stevens Phone: 6173053500 Email: Nancy.Stevens@state.ma.us
MA Executive Office of Elder Affairs	Type of organization: Unit of State Government Contact Name: Ms. Annette Peele Phone: 6177277750 Email: Annette.v.Peele@state.ma.us
MA Office on Disabilities	Type of organization: Unit of State Government Contact Name: Jeff Dougan Phone: 617727744027316 Email: Jeff.Dougan@state.ma.us
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
Massachusetts Oil Heat Council	Type of organization: Non-profit (not a financial institution) Contact Name: Michael Ferrante Phone: 7813650844 Email: mferrante@massenergymarketers.org
National Consumer Law Center	Type of organization: Non-profit (not a financial institution) Contact Name: Charles Harak Phone: 6175428010 Email: charak@nclc.org
National Grid	Type of organization: Utility Contact Name: Ms. Amy Vavak Phone: 8003223223 Email: amy.vavak@nationalgrid.com
NStar Electric	Type of organization: Utility Contact Name: Cheryl Harrington, Residential Energy Efficiency Mgr. Phone: 7814418720 Email: Cheryl.Harrington@eversource.com

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United Way of Massachusetts Bay	Type of organization: Non-profit (not a financial institution) Contact Name: Ms. Diane Franz Phone: 6176248000 Email: df Franz@supportunitedway.org
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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
02/02/2018	Legal Notices for the 2/2/2018 DOE WAP Public Hearing appeared during the week of January 15, 2018 in: The Boston Globe, Eagle Tribune, The Enterprise, Patriot Ledger, The Republican, Worcester Telegram & Gazette. The Notice of Open Meeting/Public Hearing was posted on DHCD's website and notifications were sent to the MA Secretary of State's Office, the Executive Office of Administration and Finance, and the MA Office of the Attorney General.

IV.7 Miscellaneous

The Massachusetts Department of Housing and Community Development's (DHCD) Recipient Business Officer is: Ms. Jennifer Maddox, Chief Financial Officer; Jennifer.Maddox@mass.gov ; (617) 573-1250. The Recipient Primary Investigator is: Eric Beaton, Supervisor, Energy Conservation Unit; Eric.Beaton@mass.gov ; (617) 573-1428.

For FY 2018 budget planning, DHCD initially followed DOE guidance and budgeted at the same funding level as FY 2016 under the existing Continuing Resolution. DHCD informed all Subgrantees of this budget plan at both the WAP preliminary planning meeting for the State Plan on 1/10/18 as well as the WAP Public Hearing on 2/2/18. Subgrantees were made aware that the WAP budget and subsequent allocations may change depending upon a final federal budget being determined. There will be no need to hold a follow-up WAP Public Hearing as the process for, and possible outcomes, of a Continuing Resolution vs. final determined federal budget have been outlined and discussed with the Subgrantees and other interested parties. Since DOE released WPN 18-2 on April 12, 2018, DHCD has revised the WAP State Plan and budget for the full funded amount of \$7,118,536 via State Plan and Budget Revision #1.

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.

The Massachusetts WAP Policy Advisory Council (PAC) typically meets 2-3 times during the year. The WAP PAC convened for a meeting on 7/12/17 to discuss the results of the DOE ACSI survey and other related WAP matters as well as on 1/26/18 to go over the 2018 State Plan and other WAP related matters. Input from the PAC membership is solicited and welcomed regarding the development 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). In addition, the Supervisor, Energy Conservation Unit, has been appointed to the Massachusetts Energy Efficiency Advisory Council (EEAC) by the Massachusetts Department of Public Utilities. The EEAC is a Council which meets monthly and is chaired by the Commissioner of the Massachusetts Department of Energy Resources. The Energy Efficiency Advisory Council guides the progress of energy efficiency in the Commonwealth, ensuring our continuing leadership in implementation, integration, and innovation. DHCD's involvement with the EEAC will help to ensure that low-income residents are adequately served by the utilities as the EEAC works in collaboration with the utilities on their 3-year energy efficiency plans. 3-year plans for 2019-2021 are in the process of being developed and finalized during calendar year 2018.

DHCD recently conducted a personnel time accounting analysis and as a result, four (4) staff positions not previously included in the WAP budget are now being added as these staff positions spend a small percentage of time working on WAP-related matters during the course of the Program Year. The four (4) staff positions being added are: Legal Counsel, Contracts Manager, Administrative Assistant, and Receptionist.

The Massachusetts fringe rate used for the DOE WAP budget includes the U.S. Health and Human Services approved fringe rate of 34.86% plus the approved payroll tax rate of 1.41%. Total fringe rate charged to employees salaries is 36.27%. This rate represents an increase from last year's State Plan when the rate was 33.50%.

Massachusetts Subgrantee agencies receiving less than \$350,000 do not receive any additional administrative funds in the budget or in their contracts with DHCD.

DHCD has also updated the Massachusetts WAP Health and Safety Plan, using the recommended DOE format, in accordance with WPN 17-7.

The audit and related management letter submitted as attachments to this State Plan submittal are the most recent versions possessed by DHCD. When the new audit and management letter are received for the year ended June 30 2017, DHCD will submit them to DOE.

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Lastly, the current administration in Massachusetts recently named a new Undersecretary for DHCD. Janelle Chan began work at DHCD on April 30, 2018.