

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

**(Grant Number: EE0007926, State: MA, Program Year: 2020)**

**IV.1 Subgrantees**

<b>Subgrantee (City)</b>	<b>Planned Funds/Units</b>
Action for Boston Community Development (Boston)	\$803,300.00 130
ACTION, Incorporated (Gloucester)	\$800,190.00 119
Berkshire Community Action Council Inc. (Pittsfield)	\$310,480.00 48
Citizens for Citizens (Fall River)	\$761,230.00 123
Community Action Pioneer Valley (Greenfield)	\$430,680.00 68
Community Action Programs, Intercity (Chelsea)	\$767,240.00 124
Greater Lawrence Community Action Council Inc. (Lawrence)	\$685,080.00 108
Housing Assistance Corporation (Hyannis)	\$292,450.00 45
Quincy Community Action Programs (Quincy)	\$480,740.00 74
South Middlesex Opportunity Council (Framingham)	\$1,030,855.00 123
Springfield Partners in Community Action (Springfield)	\$737,190.00 119
Worcester Community Action Council (Worcester)	\$751,190.00 119
<b>Total:</b>	<b>\$7,850,625.00 1,200</b>

**IV.2 WAP Production Schedule**

<b>Weatherization Plans</b>	<b>Units</b>
Total Units (excluding reweatherized)	1,164
Rewatherized Units	36
Note: Planned units by quarter or category are no longer required, no information required for persons.	

<b>Average Unit Costs, Units subject to DOE Project Rules</b>		
<b>VEHICLE &amp; EQUIPMENT AVERAGE COST PER DWELLING UNIT (DOE RULES)</b>		
A	Total Vehicles & Equipment (\$5,000 or more) Budget	\$0.00
B	Total Units Weatherized	1,164
C	Total Units Reweatherized	36
D	Total Dwelling Units to be Weatherized and Reweatherized (B + C)	1,200
E	Average Vehicles & Equipment Acquisition Cost per Unit (A divided by D)	\$0.00
<b>AVERAGE COST PER DWELLING UNIT (DOE RULES)</b>		
F	Total Funds for Program Operations	\$5,670,000.00
G	Total Dwelling Units to be Weatherized and Reweatherized (from line D)	1,200
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	1200	29.3	35160
Prior Year Estimate	1134	29.3	33226
Prior Year Actual	607	29.3	17785

**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 2020 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 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 2019, the WAP Network in Massachusetts leveraged approximately \$49 million for use in DSM, AMPs, and heating system programs for single and small multi-family income eligible dwellings. A total of 17,265 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 \$8,509,094 equates to .41% 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: <a href="mailto:rslater@beld.com">rslater@beld.com</a>
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: <a href="mailto:elj@actioninc.org">elj@actioninc.org</a>
MA Department of Energy Resources	Type of organization: Unit of State Government Contact Name: Ms. Alissa Whiteman Phone: 6176267313 Email: <a href="mailto:alissa.whiteman@mass.gov">alissa.whiteman@mass.gov</a>
MA Department of Public Utilities	Type of organization: Unit of State Government Contact Name: Ms. Nancy Stevens Phone: 6173053500 Email: <a href="mailto:Nancy.Stevens@mass.gov">Nancy.Stevens@mass.gov</a>
MA Executive Office of Elder Affairs	Type of organization: Unit of State Government Contact Name: Ms. Marylouise Gamache Phone: 6177277750 Email: <a href="mailto:marylouise.gamache@mass.gov">marylouise.gamache@mass.gov</a>
MA Office on Disabilities	Type of organization: Unit of State Government Contact Name: Ms. Jakira Rogers, Access Specialist Phone: 6177277440 Email: <a href="mailto:jakira.rogers@mass.gov">jakira.rogers@mass.gov</a>
Massachusetts Energy Director's Association	Type of organization: Non-profit (not a financial institution) Contact Name: Mr. Peter Wingate Phone: 4137742318 Email: <a href="mailto:Pwingate@communityaction.us">Pwingate@communityaction.us</a>
National Consumer Law Center	Type of organization: Non-profit (not a financial institution) Contact Name: Mr. Charles Harak Phone: 6175428010 Email: <a href="mailto:charak@nclc.org">charak@nclc.org</a>
National Grid	Type of organization: Utility Contact Name: Ms. Amanda Formica, Analyst, Customer Energy Management Phone: 7819075851 Email: <a href="mailto:amanda.formica@nationalgrid.com">amanda.formica@nationalgrid.com</a>
NStar Electric	Type of organization: Utility Contact Name: Ms. Deborah Sas, Energy Consultant, Energy Efficiency Phone: 4137879125 Email: <a href="mailto:deborah.sas@eversource.com">deborah.sas@eversource.com</a>
United Way of Massachusetts Bay	Type of organization: Non-profit (not a financial institution) Contact Name: Ms. Diane Franz Phone: 6176248000 Email: <a href="mailto:df Franz@supportunitedway.org">df Franz@supportunitedway.org</a>

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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
01/24/2020	The Notice of Open Meeting/Public Hearing was posted on DHCD's website on January 10, 2020. The weblink is: <a href="https://www.mass.gov/service-details/dhcd-open-meeting-notices">https://www.mass.gov/service-details/dhcd-open-meeting-notices</a> 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: Ms. Jennifer Maddox, Chief Financial Officer; [Jennifer.Maddox@mass.gov](mailto:Jennifer.Maddox@mass.gov) ; (617) 573-1250. The Recipient Primary Investigator is: Eric Beaton, Supervisor, Energy Conservation Unit; [Eric.Beaton@mass.gov](mailto:Eric.Beaton@mass.gov) ; (617) 573-1428.

For PY 2020 budget planning, DHCD initially followed DOE guidance in WPN 19-2 and budgeted according to the award of \$7,507,308. DHCD informed all Subgrantees of this budget plan at both the WAP preliminary planning meeting for the State Plan on 1/10/2020 as well as the WAP Public Hearing on 1/24/2020. During these meetings, DHCD informed the Subgrantee network that once the final budget allocation was received from DOE, DHCD would revise the budget allocations. Once DOE released WPN 20-2 on February 10, 2020, DHCD revised the budget and budgeted according to the award of \$8,509,094.

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.

DHCD reviewed the 2019 ACSI survey results and discussed them with our Subgrantee network at the 10-10-2019 WAP Director's Meeting. While almost all Massachusetts' scores were above the nationwide average, the only score that was lower than the national average was "Timing of Distribution Funds Ensured No Service Interruption". The next lowest score was "Extent of Involvement in Developing State Plan". DHCD discusses the State Plan and solicits input on the State Plan with our Subgrantee network at our annual Preliminary Planning meeting. We also discuss it with our PAC, and have it available ahead of time for our Public Hearing. Because Massachusetts is an April 1 Grantee, the timing of funds is highly connected to DOE's approval of the grant in terms of service interruption. In PY 2019, DHCD held 3 trainings that were suggested by our network as part of the 2017 ACSI: "Administrative Training for Non-Technical Subgrantee Staff" (Trainer: Amy Klusmeier, NASCSP), "Client Education Training" (Trainers: Suzanne Harmelink and Rana Belshe), and "Fiscal Training" (Trainer: Kevin Myren). DHCD will evaluate all comments made as part of the 2019 ACSI and continue to provide useful trainings to our network as desired.

The Massachusetts WAP Policy Advisory Council (PAC) typically meets 2-3 times during the year. The WAP PAC convened for a meeting on 7/19/19 as well as on 1/17/2020 to go over the 2020 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).

The Massachusetts fringe rate used for the DOE WAP budget includes the U.S. Health and Human Services approved fringe benefits rate of 35.48% plus the approved payroll tax rate of 2.43%. Total fringe rate charged to employees salaries is 37.91%. This rate represents an increase from last year's State Plan when the rate was 36.62%.

The cost allocation plan posted by the Comptroller's office (<http://www.macomptroller.info/comptroller/business-functions/federal-grants-and-cost-allocation/cost-allocation/swcap.htm>) lists the FY 2018 statewide Cost Allocation Plan as the most recent. Typically this gets released between late March and July each year. Once the FY 2019 Plan is released, DHCD will forward it to DOE. Likewise, the single 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 2019, DHCD will submit them to DOE.

DHCD no longer utilizes print advertisements in newspapers to alert the public of the Hearing. DHCD will publish an Open Meeting Notice to its website for the public to access. The current weblink to the January 24, 2020 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. Our current 5-year approval expired on December 5, 2019. DHCD is currently responding to questions from DOE and SMS consultants. DHCD is committed to working to get the package approved as quickly as possible.

DHCD received approval from DOE Project Officer Christine Askew on October 18, 2019 to carryover \$442,678 of PY 2018 funds to PY 2019 for

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weatherization of additional units, administrative costs, and Green Jobs Academy training center expansion work. This carryover approval also resulted in 59 additional units being assigned to our Subgrantee network. Should there be any remaining funds unspent after PY 2019, DHCD will alert DOE as to the amount which will be carried over to PY 2020 as outlined in WAP Memo #55.

DHCD's Undersecretary, Janelle Chan, vacated her position on January 31, 2020. DHCD's Chief Financial Officer, Jennifer Maddox was named the new Undersecretary of DHCD on February 21, 2020.

Lastly, one of DHCD's two WAP Technical Field Monitors will be retiring on April 15, 2020. DHCD has worked internally with Human Resources to update the job description. DHCD posted the job description on February 28, 2020 through the state job board (Mass Careers) as well as through the NASCSP job board, Massachusetts Clean Energy Center, and various other venues. Interviews will likely occur during March with the hope of bringing the new Energy Programs Technical Field Monitor on board as soon as possible after April 15, 2020.