

## APPLICATION FOR FEDERAL ASSISTANCE SF-424

Version 02

## 1. Type of Submission:

- Preapplication
- Application
- Changed/Corrected Application

## 2. Type of Application:

- New
- Continuation
- Revision

If Revision, select appropriate letter(s)

Other (specify):

3. Date Received

4. Applicant Identifier:

5a. Federal Entity Identifier:

5b. Federal Award Identifier:

DE-EE0009930

## State Use Only:

6. Date Received by State:

7. State Application Identifier:

## 8. APPLICANT INFORMATION:

a. Legal Name: South Carolina State of

b. Employer/Taxpayer Identification Number (EIN/TIN):  
576000286c. UEI:  
UL2HEZMR7HN1

## d. Address:

Street 1: 1205 Pendleton Street

Street 2:

City: Columbia

County: RICHLAND County

State: SC

Province:

Country: U.S.A.

Zip / Postal Code: 292010000

## e. Organizational Unit:

Department Name:

South Carolina Department of Administration

Division Name:

Office of Economic Opportunity

## f. Name and contact information of person to be contacted on matters involving this application:

Prefix: Mr First Name: Matthew

Middle Name:

Last Name: Melton

Suffix:

Title: Senior Manager for Weatherization

Organizational Affiliation: Office of Economic Opportunity Department of Administration

Telephone Number: 8037349861

Fax Number: 8037340356

Email: matthew.melton@admin.sc.gov

**APPLICATION FOR FEDERAL ASSISTANCE SF-424**

Version 02

**9. Type of Applicant:**

A State Government

**10. Name of Federal Agency:**

U. S. Department of Energy

**11. Catalog of Federal Domestic Assistance Number:**

81.042

CFDA Title:

Weatherization Assistance Program

**12. Funding Opportunity Number:**

DE-WAP-0002024

Title:

2024 Weatherization Assistance Program (WAP)

**13. Competition Identification Number:**

Title:

**14. Areas Affected by Project (Cities, Counties, States, etc.):**

Statewide

**15. Descriptive Title of Applicant's Project:**

Weatherization Assistance Funding Opportunity

**APPLICATION FOR FEDERAL ASSISTANCE SF-424**

Version 02

**16. Congressional District Of:**

a. Applicant: South Carolina Congressional District 02

b. Program/Project: SC-Statewide

**Attach an additional list of Program/Project Congressional Districts if needed:****17. Proposed Project:**

a. Start Date: 04/01/2024

b. End Date: 03/31/2025

**18. Estimated Funding (\$):**

a. Federal	2,945,751.00
b. Applicant	0.00
c. State	0.00
d. Local	0.00
e. Other	0.00
f. Program Income	0.00
g. TOTAL	2,945,751.00

**19. Is Application subject to Review By State Under Executive Order 12372 Process?:**

- a. This application was made available to the State under the Executive Order 12372 Process for review
- b. Program is subject to E.O. 12372 but has not been selected by the State for review.
- c. Program is not covered by E.O. 12372

**20. Is the applicant Delinquent On Any Federal Debt? (If "Yes", provide explanation)**

No

**21. By signing this application, I certify (1) to the statements contained in the list of certifications\*\* and (2) that the statements herein are true, complete and accurate to the best of my knowledge. I also provide the required assurances\*\* and agree to**

 I AGREE

\*\* The list of certifications and assurances, or an internet site where you may obtain this list, is contained in the announcement or agency

**Authorized Representative:**

Prefix: Mr First Name: James

Middle Name: E

Last Name: Miller

Suffix:

Title: Director, Office of Economic Opportunity

Telephone Number: 8037340425

Fax Number: 8037340356

Email: James.Miller@admin.sc.gov

Signature of Authorized Representative: Signed Electronically

**Date Signed:**

**BUDGET INFORMATION - Non-Construction Programs**

1. Program/Project Identification No. EE0009930		2. Program/Project Title Weatherization Assistance Program	
3. Name and Address South Carolina State of 1205 Pendleton Street Columbia, SC 292010000		4. Program/Project Start Date 04/01/2024	5. Completion Date 03/31/2025

**SECTION A - BUDGET SUMMARY**

Grant Program Function or Activity (a)	Federal Catalog No. (b)	Estimated Unobligated Funds		New or Revised Budget		
		Federal (c)	Non-Federal (d)	Federal (e)	Non-Federal (f)	Total (g)
1. Federal	81.042	\$ 0.00		\$ 2,945,751.00		\$ 2,945,751.00
2.						
3.						
4.						
5. TOTAL		\$ 0.00	\$ 0.00	\$ 2,945,751.00	\$ 0.00	\$ 2,945,751.00

**SECTION B - BUDGET CATEGORIES**

6. Object Class Categories	Grant Program, Function or Activity				Total (5)
	(1) GRANTEE ADMINISTRATI ON	(2) SUBGRANTEE ADMINISTRATI ON	(3) GRANTEE T&TA	(4) SUBGRANTEE T&TA	
a. Personnel	\$ 27,335.00	\$ 0.00	\$ 141,530.00	\$ 0.00	\$ 168,865.00
b. Fringe Benefits	\$ 11,619.00	\$ 0.00	\$ 60,150.00	\$ 0.00	\$ 71,769.00
c. Travel	\$ 0.00	\$ 0.00	\$ 16,710.00	\$ 0.00	\$ 16,710.00
d. Equipment	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
e. Supplies	\$ 6,750.00	\$ 0.00	\$ 1,700.00	\$ 0.00	\$ 8,450.00
f. Contract	\$ 35,000.00	\$ 236,273.00	\$ 10,000.00	\$ 241,056.00	\$ 2,628,235.00
g. Construction	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
h. Other Direct Costs	\$ 20,000.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 20,000.00
i. Total Direct Charges	\$ 100,704.00	\$ 236,273.00	\$ 230,090.00	\$ 241,056.00	\$ 2,914,029.00
j. Indirect Costs	\$ 17,089.00	\$ 0.00	\$ 14,633.00	\$ 0.00	\$ 31,722.00
k. Totals	\$ 117,793.00	\$ 236,273.00	\$ 244,723.00	\$ 241,056.00	\$ 2,945,751.00
7. Program Income	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

**BUDGET INFORMATION - Non-Construction Programs**

1. Program/Project Identification No. EE0009930		2. Program/Project Title Weatherization Assistance Program	
3. Name and Address South Carolina State of 1205 Pendleton Street Columbia, SC 292010000		4. Program/Project Start Date 04/01/2024	5. Completion Date 03/31/2025

SECTION A - BUDGET SUMMARY						
Grant Program Function or Activity (a)	Federal Catalog No. (b)	Estimated Unobligated Funds		New or Revised Budget		
		Federal (c)	Non-Federal (d)	Federal (e)	Non-Federal (f)	Total (g)
1.						
2.						
3.						
4.						
5. TOTAL		\$ 0.00	\$ 0.00	\$ 2,945,751.00	\$ 0.00	\$ 2,945,751.00

SECTION B - BUDGET CATEGORIES						
6. Object Class Categories	Grant Program, Function or Activity				Total (5)	
	(1) HEALTH AND SAFETY	(2) PROGRAM OPERATIONS	(3) LIABILITY INSURANCE	(4) Weatherization Readiness		
a. Personnel	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 168,865.00	
b. Fringe Benefits	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 71,769.00	
c. Travel	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 16,710.00	
d. Equipment	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	
e. Supplies	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 8,450.00	
f. Contract	\$ 248,154.00	\$ 1,568,347.00	\$ 0.00	\$ 289,405.00	\$ 2,628,235.00	
g. Construction	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	
h. Other Direct Costs	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 20,000.00	
i. Total Direct Charges	\$ 248,154.00	\$ 1,568,347.00	\$ 0.00	\$ 289,405.00	\$ 2,914,029.00	
j. Indirect Costs	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 31,722.00	
k. Totals	\$ 248,154.00	\$ 1,568,347.00	\$ 0.00	\$ 289,405.00	\$ 2,945,751.00	
7. Program Income	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	



**BUDGET JUSTIFICATION FOR FORMULA GRANTS**

Applicant: South Carolina State of  
 Award number: EE0009930

Budget period: 04/01/2024 - 03/31/2025

1. **PERSONNEL** - Prime Applicant only (all other participant costs are listed in 6 below and form SF-242A, Section B. Line 6.f. Contracts and Sub-Grants).

Positions to be supported under the proposed award and brief description of the duties of professionals:

<u>Position</u>	<u>Description of Duties of Professionals</u>
Accountant/Fiscal Analyst	Under supervision of the senior manager for fiscal services, assists in the review and approval process of all subgrantee budgets. Prepares various comparative reports on expenditures by funding program(s), provides technical assistance and performs specialized analysis of program fiscal data. Portions of this salary not paid with DOE funds will be paid by state and CSBG funds.
Senior Accountant/Fiscal Analyst	Under supervision of the senior manager of fiscal services assist in the technical review of Weatherization Budget, State Plan, allocations to subgrantees, internal controls and required federal reporting. Portions of this salary not paid with DOE funds will be paid by state and CSBG funds.
Accounting/Fiscal Manager I	Under supervision of the director, provides supervision of the fiscal monitoring staff and the grants fiscal staff to ensure grants are properly recorded and monitored appropriately. Works with subgrantees to ensure budgets are properly allocated and that federal and state laws and regulations are followed. Portions of this salary not paid with DOE funds will be paid by state and CSBG funds.
Administrative Coordinator I	Under supervision of the director, manages the general administrative duties of the office including telephone, personnel files, etc. Portions of this salary not paid with DOE funds will be paid by state funds.
Accountant/Fiscal Analyst	Under supervision of the senior manager for fiscal services, assists in the review and approval process of all subgrantee budgets. Prepares various comparative reports on expenditures by funding program(s), provides technical assistance, and performs specialized analysis of program fiscal data. Portions of this salary not paid with DOE funds will be paid by state and CSBG funds.
Professional Auditor	Responsible for performing financial monitoring of subgrantees by making on-site field visits to determine financial contract compliance. Performs technical fiscal assistance. Portions of this salary not paid with DOE funds will be paid by state and CSBG funds.
Administrative Assistant	Assists with general administration within the office, assists with directing phone calls from constituents with regards to needed services, files contracts and maintains other areas of the office. Portions of this salary not paid with DOE funds will be paid by state funds.
Program Coordinator II	Works under the supervision of the senior manager for Weatherization, to ensure the Weatherization Assistance Program operates in accordance with state and federal regulations through monitoring, training and technical assistance. Coordinates and monitors subgrantees. Ensures that minimal requirements are met and work quality remains consistent by subgrantees throughout the state. Performs QCI as a part of the monitoring for the subgrantees. 50% of the salary for this employee will be covered under T&TA. Portions of this salary not paid with DOE funds will be paid by LIHEAP funds.

Senior Accountant/Fiscal Analyst	Under supervision of the fiscal services manager, assists in the technical review of Weatherization Budget, State Plan, allocations to subgrantees, internal controls and required federal reporting. Portions of this salary not paid with DOE funds will be paid by LIHEAP and CSBG funds.
Program Manager II	Responsible for the overall management of OEO grant programs and staff. Portions of this salary not paid with DOE funds will be paid by LIHEAP and CSBG funds.
Accountant/Fiscal Analyst	Under supervision of the senior fiscal manager, assists in the review and approval process of all subgrantee budgets. Prepares various comparative reports on expenditures by funding program(s), provides technical assistance and performs specialized analysis of program fiscal data. Portions of this salary not paid with DOE funds will be paid by LIHEAP and CSBG funds.
Attorney III	Responsible for the legal oversight of OEO operations and contracts. Portions of this salary not paid with DOE funds will be paid by LIHEAP and CSBG funds.
Professional Auditor	Responsible for performing financial monitoring of subgrantees by making on-site field visits to determine financial contract compliance. Performs technical fiscal assistance. Portions of this salary not paid with DOE funds will be paid by LIHEAP and CSBG funds.
Program Manager III	Oversees the Director and operations for the OEO. Portions of this salary not paid with DOE funds will be paid by state, LIHEAP, and CSBG funds.
Senior Auditor	Responsible for performing financial monitoring of subgrantees by making on-site field visits to determine financial contract compliance. Performs technical fiscal assistance. Portions of this salary not paid with DOE funds will be paid by LIHEAP and CSBG funds.
Senior Auditor	Responsible for performing financial monitoring of subgrantees by making on-site field visits to determine financial contract compliance. Performs technical fiscal assistance. Portions of this salary not paid with DOE funds will be paid by state, LIHEAP, and CSBG funds.
Program Manager I	Under supervision of the agency director, manages the development and coordination of the WAP State Plan, including development of procedures and objectives for program, as well as implementing program procedures in accordance with federal and state regulations and guidelines. Supervises staff whose duties include monitoring and specialized training and technical assistance. Serves as program liaison. 29.25 percent of this salary will be covered as administration since this is the lead person responsible for the grant. The balance is paid from the T&TA fund. This position works on the budget, coordinates with the office staff to procure goods and services, and provides other administrative duties for the grant in addition to monitoring subrecipients.
Program Coordinator II	Works under the supervision of the senior manager for Weatherization, to ensure the Weatherization Assistance Program operates in accordance with state and federal regulations through monitoring. Assists with writing and updating state plan WAP Policies and Procedures. Salary paid entirely with WAP Administrative funds.

Direct Personnel Compensation:

Position	Salary/Rate	Time	Direct Pay
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Accountant/Fiscal Analyst	\$58,000.00	2.5003 % FT	\$1,450.17
Senior Accountant/Fiscal Analyst	\$61,350.00	2.0002 % FT	\$1,227.12
Accounting/Fiscal Manager I	\$88,000.00	2.0001 % FT	\$1,760.09
Administrative Coordinator I	\$53,000.00	2.0003 % FT	\$1,060.16
Accountant/Fiscal Analyst	\$50,000.00	2.0003 % FT	\$1,000.15
Professional Auditor	\$50,000.00	2.0003 % FT	\$1,000.15
Administrative Assistant	\$31,185.00	2.0004 % FT	\$623.82
Program Coordinator II	\$69,000.00	50.0003 % FT	\$34,500.21
Senior Accountant/Fiscal Analyst	\$76,000.00	6.5002 % FT	\$4,940.15
Program Manager II	\$95,000.00	2.0001 % FT	\$1,900.10
Accountant/Fiscal Analyst	\$50,000.00	2.0003 % FT	\$1,000.15
Attorney III	\$75,000.00	2.0001 % FT	\$1,500.08
Professional Auditor	\$53,701.00	2.5003 % FT	\$1,342.69
Program Manager III	\$118,450.00	1.0001 % FT	\$1,184.62
Senior Auditor	\$78,000.00	2.0000 % FT	\$1,560.00
Senior Auditor	\$55,000.00	1.9003 % FT	\$1,045.16
Program Manager I	\$76,000.00	70.7502 % FT	\$53,770.15
Program Coordinator II	\$58,000.00	100.0000 % FT	\$58,000.00
		Direct Pay Total	\$168,864.97

## 2. FRINGE BENEFITS

- a. Are the fringe cost rates approved by a Federal Agency? If so, identify the agency and date of latest rate agreement or audit below, and attach a copy of the rate agreement to the application.
  
- b. If a. above does not apply, please use this box (or an attachment) to further explain how your total fringe benefits costs were calculated. Your calculations should identify all rates used, along with the base they were applied to (and how the base was derived), and a total for each (along with grand total). If there is an established computation methodology approved for state-wide use, please provide a copy. Also, please fill out the table below with the Fringe Benefits Calculations.



- Social Security  
7.65%
- Workers Compensation  
1.00%
- Unemployment  
0.12%
- Health Insurance  
15.00%
- Dental Insurance  
0.3%
- Pre-retirement Death  
0.2%
- Retirement  
16.00%
- Retirement - Optional Retirement Plan  
2.00%
- 42.50%

A new IDC rate has not been approved. The IDC rate provided as of 2017 is still the most recently approved IDC rate. The SC Office of Economic Opportunity (OEO) is under the Department of Administration which submits the proposals for new IDC rates. A proposal for a new IDC rate was submitted in April 2018 but did not receive approval. OEO reached out to the finance over of the Dept. of Administration regarding a new rate. A new proposal is currently being put together, and the OEO will notify DOE of any changes as soon as new information becomes available.

Fringe Benefits Calculations

<u>Position</u>	<u>Direct Pay</u>	<u>Rate</u>	<u>Benefits</u>
Accountant/Fiscal Analyst	\$1,450.17	42.5022 %	\$616.35
Senior Accountant/Fiscal Analyst	\$1,227.12	42.5045 %	\$521.58
Accounting/Fiscal Manager I	\$1,760.09	42.5056 %	\$748.14
Administrative Coordinator I	\$1,060.16	42.5042 %	\$450.61
Accountant/Fiscal Analyst	\$1,000.15	42.5054 %	\$425.12
Professional Auditor	\$1,000.15	42.5075 %	\$425.14
Administrative Assistant	\$623.82	42.5085 %	\$265.18
Program Coordinator II	\$34,500.21	42.5003 %	\$14,662.69
Senior Accountant/Fiscal Analyst	\$4,940.15	42.5013 %	\$2,099.63
Program Manager II	\$1,900.10	42.5065 %	\$807.67
Accountant/Fiscal Analyst	\$1,000.15	42.5125 %	\$425.19
Attorney III	\$1,500.08	42.5084 %	\$637.66
Professional Auditor	\$1,342.69	42.5092 %	\$570.77
Program Manager III	\$1,184.62	42.5104 %	\$503.59
Senior Auditor	\$1,560.00	42.5082 %	\$663.13
Senior Auditor	\$1,045.16	42.5131 %	\$444.33
Program Manager I	\$53,770.15	42.5002 %	\$22,852.42
Program Coordinator II	\$58,000.00	42.5000 %	\$24,650.00
		Fringe Benefits Total	\$71,769.20

**3. TRAVEL**

- a. Please provide the purpose of travel, such as professional conference(s), DOE sponsored meeting(s), project management meeting, etc. If there is any foreign travel, please identify.

<u>Purpose of Trip</u>	<u>Number of Trips</u>	<u>Cost Per Trip</u>	<u>Total</u>
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<p>The National Home Performance Conference will be held in Minneapolis, Minnesota in April 2024. OEO will pay for two OEO weatherization staff member to attend. Estimate includes airfare (\$400), hotel for four nights (\$500), and registration (\$100).</p>	2	\$2,000.00	\$4,000.00
<p>The Energy Out West Conference will be held in Austin, Texas in August 2024. OEO will pay for four weatherization staff members to attend. Estimate includes airfare (\$800), hotel for four nights (\$1000), and registration (\$200).</p>	3	\$2,000.00	\$6,000.00
<p>The NASCSP Annual Conference will be held in September 2024 at a to be determined site. OEO will pay for two weatherization staff members to attend. Estimate includes airfare (\$600), hotel for three nights (\$1000), and registration (\$200).</p>	2	\$1,800.00	\$3,600.00
<p>Meals and travel cost to the state conference which is organized by the South Carolina Association of Community Action Partnerships (SCACAP). Four members of the OEO Weatherization staff will attend and provide training to the eight sub-grantees and attend other trainings that are provided through the State Association. These funds are for the cost of meals and lodging as allowed by the state, limited to \$35 per day. This covers the cost for two weatherization staff members to attend.</p>	2	\$1,555.00	\$3,110.00
Travel Total			\$16,710.00

- b. Please provide the basis for estimating the costs, such as past trips, current quotations, Federal Travel Regulations, etc. All listed travel must be necessary for the performance of the award objectives.

**Monitoring Visits**

There are seven Community Action Agencies which will require overnight travel for four people to complete the program, technical, and fiscal monitoring. Each monitoring visit will consist of four days for the cost \$185 per night. This amount covers the cost of hotel at no more than the federal GSA rate, and meal expense that cannot exceed \$35 per day, based on state law. Total \$5,180.

**4. EQUIPMENT** - Equipment is generally defined as an item with an acquisition cost greater than \$5,000 and a useful life expectancy of more than one year.

- a. List all proposed equipment below and briefly justify its need as it applies to the objectives of the award.

<u>Equipment</u>	<u>Unit Cost</u>	<u>Number</u>	<u>Total Cost</u>	<u>Justification of Need</u>
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- b. Please provide a basis of cost such as vendor quotes, catalog prices, prior invoices, etc. and justify need. If the Equipment is being proposed as Cost Share and was previously acquired, please provide the source and value of its contribution to the project and logical support for the estimated value shown. If it is new equipment which will retain a useful life upon completion of the project, provide logical support for the estimated value shown. Also, please indicate whether the Equipment is being used for other projects or is 100% dedicated to the DOE project.

**5. SUPPLIES** - Supplies are generally defined as an item with an acquisition cost of \$5,000 or less and a useful life expectancy of less than one year. Supplies are generally consumed during the project performance.

- a. List all proposed supplies below, the estimated cost, and briefly justify the need for the supplies as they apply to the objectives of the award. Note that all direct costs, including Supply items, may not be duplicative of supply costs included in the indirect pool that is the basis of the indirect rate applied for this project.

<u>General Category</u>	<u>Cost</u>	<u>Justification of Need</u>
Office Supplies	\$4,000.00	Operating supplies to include paper, toner cartridges, binders, folders and general supplies that may be needed in the office for program and monitoring staff. This includes advertising cost, public notice, and transcription of public hearing \$1,500, phone service \$300, data processing supplies \$1,000
Personal Gas Monitor	\$800.00	Personal gas monitor for QCI monitoring.
Operational Costs	\$3,000.00	Operations- paper, office supplies and training materials. Office supplies will be for the cost of materials handed out during training conferences to be held, and will be limited to \$500. Items used during monitoring process including disposable suits and booties. Cost Basis - Prior purchases of similar or like items.
Lead Paint Testing Kit	\$500.00	Used when monitoring to determine presence of lead paint in dwellings built before 1978. 50 kits x \$10
Flashlight	\$150.00	Two flashlight for QCI monitoring.
Materials and Supplies Total	\$8,450.00	

- b. Please provide a basis of cost for each item listed above and justify need. Examples include vendor quotes, prior purchases of similar or like items, published price list, etc.

Administrative operations - paper, office supplies and training materials. Cost Basis - Prior purchases of similar or like items.

**6. CONTRACTS AND SUBGRANTS** - Provide the following information for New proposed subrecipients and subcontractors.

For ongoing subcontractors and subrecipients, this information does not have to be restated here, if it is provided elsewhere in the application; under Name of Proposed Sub, indicate purpose of work and where additional information can be found (i.e weatherization subgrants, Annual File section IV.1).

<u>Name of Proposed Sub</u>	<u>Total Cost</u>	<u>Basis of Cost*</u>
Chesterfield Marlboro Economic Opportunity Council	\$140,536.00	\$17,567 is awarded for administration, \$13,114 is awarded as T&TA, \$12,858 is awarded as Health & Safety, \$81,253 is awarded for program operations, and \$15,744 is awarded as Weatherization Readiness. Of the new funds awarded, \$140,536, only 12.5% may be used for administration. Counties served Chesterfield, Darlington, Dillon, Marlboro.
GLEAMNS Human Resources Commission	\$562,321.00	\$42,174 is awarded for administration, \$52,473 is awarded as T&TA, \$55,282 is awarded as Health & Safety, \$349,394 is awarded for program operations, and \$62,998 is awarded as Weatherization Readiness. Of the new funds awarded, \$562,321, 7.5% may be used for administration. Counties served Abbeville, Anderson, Cherokee, Edgefield, Greenwood, Laurens, McCormick, Newberry, Oconee, Pickens, Saluda, Spartanburg.
Apple Energy Group	\$12,000.00	Quality Control Inspections conducted for Program Year 2024. OEO is currently contracted with Apple Energy Group to provide Quality Control Inspections. OEO estimated 15 total inspections (final and in progress to be conducted in 2024 at a cost of \$800 per inspection).

Waccamaw Economic Opportunity Council	\$232,664.00	\$29,083 is awarded for administration, \$21,711 is awarded as T&TA, \$21,284 is awarded as Health & Safety, \$134,520 is awarded for program operations, and \$26,066 is awarded as Weatherization Readiness. Of the new funds awarded, \$232,664, only 12.5% may be used for administration. Counties served Georgetown, Horry, Williamsburg.
DBA FACSPRO/LITT Software Annual License	\$15,000.00	Grantee Admin - These funds will be used to offset cost of the annual software cost for the database used to track finances and program operations for the agencies that provide weatherization services. Custom work on the module to adapt from Michigan to South Carolina has been completed. Estimated cost is based on the new contract awarded to the vendor from the RFP placed this year.
Wateree Community Actions	\$250,408.00	\$31,301 is awarded for administration, \$23,367 is awarded as T&TA, \$22,908 is awarded as Health & Safety, \$144,778 is awarded for program operations, and \$28,054 is awarded as Weatherization Readiness. Of the new funds awarded, \$250,408, only 12.5% may be used for administration. Counties served Clarendon, Florence, Kershaw, Lee, Marion, Sumter.
Scott and Company CPA	\$8,000.00	Administrative funds are used to cover the cost for outside accounting firm to provide additional financial monitoring to 4 of the agencies which run a weatherization program. The cost of fiscal monitoring is split among LIHEAP, CSBG, and DOE Weatherization grants.
Aiken/Barnwell Counties Community Action Agency	\$748,426.00	\$56,132 is awarded for administration, \$69,840 is awarded as T&TA, \$73,579 is awarded as Health & Safety, \$465,027 is awarded for program operations, and 83,848 is awarded as Weatherization Readiness. Of the new funds awarded, \$748,426 only 7.5% may be used for administration. Counties served Aiken, Allendale, Bamberg, Barnwell, Calhoun, Greenville, Lexington, Orangeburg, Richland.
Charleston County Human Services	\$421,894.00	\$31,642 is awarded for administration, \$39,369 is awarded as T&TA, \$41,478 is awarded as Health & Safety, \$262,139 is awarded for program operations, and \$47,266 is awarded as Weatherization Readiness. Of the new funds awarded, \$421,894, only 7.5% may be used for administration. Counties served Beaufort, Berkley, Charleston, Dorchester, Jasper.

Carolina Community Actions	\$189,492.00	\$23,687 is awarded for administration, \$17,683 is awarded as T&TA, \$17,335 is awarded as Health & Safety, \$109,558 is awarded for program operations, and \$21,229 is awarded as Weatherization Readiness. Of the new funds awarded, \$189,492, 12.5% may be used for administration. Counties served are Chester, Fairfield, Lancaster, Union, York.
Lowcountry Community Action Agency	\$37,494.00	\$4,687 is awarded for administration, \$3,499 is awarded as T&TA, \$3,430 is awarded as Health & Safety, \$21,678 is awarded for program operations, and \$4,200 is awarded as Weatherization Readiness. Of the new funding, \$37,494, only 12.5% may be used for administration. Counties served Colleton and Hampton.
DBA FACSPRO/LITT Help	\$10,000.00	Grantee T&TA funds - Amount is based on the new contract award and a change in the break down anticipated for weatherization with software updates. This vendor provides on-site and phone assistance to the Weatherization Sub-grantees for DBA. With the move to the updated DBA FACSPRO, additional assistance will be required for all agencies.
Contracts and Subgrants Total	\$2,628,235.00	

\*For example, Competitive, Historical, Quote, Catalog

**7. OTHER DIRECT COSTS** - Other direct costs are direct cost items required for the project which do not fit clearly into other categories. These direct costs may not be duplicative of costs included in the indirect pool that is the basis of the indirect rate applied for this project. Examples are: conference fees, subscription costs, printing costs, etc.

a. Please provide a General Description, Cost and Justification of Need.

General Description	Cost	Justification of Need
Insurance	\$5,000.00	Administrative funds to cover the cost of vehicle insurance for 2 Dodge vehicles, and general liability insurance coverage.
Rent - Admin Office	\$10,000.00	Covers the cost of administration office for Weatherization.
Dues NEADA & National Association for State Community Services	\$5,000.00	Administrative funds - Advocates on behalf of the weatherization programs throughout the nation, as well as provides training and technical assistance to OEO. Being a member gives OEO a source for additional education, training materials and expertise that is not held by staff members.
Other Direct Costs Total	\$20,000.00	

b. Please provide a basis of cost for each item listed above. Examples include vendor quotes, prior purchases of similar or like items, published price list, etc.

All costs included in Other Direct Charges are properly excluded from indirect costs to ensure there are not duplicate charges. All costs proposed are only being used in support of the WAP program.

Cost estimates are based on prior purchases.

**8. INDIRECT COSTS**

a. Are the indirect cost rates approved by a Federal agency? If so, identify the agency and date of latest rate agreement or audit and provide a copy of the rate agreement.

A new IDC rate has not been approved. The IDC rate provided as of 2017 is still the most recently approved IDC rate. The SC Office of Economic Opportunity (OEO) is under the Department of Administration which submits the proposals for new IDC rates. A proposal for a new IDC rate was submitted in April 2018 but did not receive approval. OEO reached out to the finance over of the Dept. of Administration regarding a new rate. A new proposal is currently being put together, and the OEO will notify DOE of any changes as soon as new information becomes available.

- b. If the above does not apply, indicate the basis for computation of rates, including the types of benefits to be provided, the rate(s) used, and the cost base for each rate. You may provide the information below or provide the calculations separately.

The name and phone number of the individual responsible for negotiating the State's indirect cost rates.

Name: Renee Rochester Phone Number: 8037370523

Indirect costs calculations:

<b>Indirect Cost Account</b>	<b>Direct Total</b>	<b>Indirect Rate</b>	<b>Total Indirect</b>
Grantee Administration	\$268,718.00	6.3596 %	\$17,089.39
Grantee T&TA	\$230,090.00	6.3596 %	\$14,632.80
		Indirect Costs Total	\$31,722.19

U.S. Department of Energy  
**WEATHERIZATION ASSISTANCE PROGRAM**  
**SUBGRANTEE INFORMATION**  
State: SC Grant Number: EE0009930 Program Year: 2024

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<b>Name: Aiken/Barnwell Counties Community Action Agency</b>		<b>Contact: George A. Anderson, Exec. Director</b>	
<b>Address: PO Box 2066</b>		<b>UEI: MC9KMKKDMJ45</b>	
291 Beaufort Street		<b>DUNS: 082918215</b>	
Aiken, SC 29802-2066		<b>Phone: (803) 648-6836</b>	
<b>Counties served: BARNWELL County</b>		<b>Fax: (803) 649-1588</b>	
AIKEN County		<b>Email: gaed291@gmail.com</b>	
GREENVILLE County		<b>Tentative allocation: \$ 748,426.00</b>	
BAMBERG County		<b>Planned units: 55</b>	
CALHOUN County		<b>Type of organization: Local agency</b>	
ALLENDALE County		<b>Congressional districts served: CD</b>	
LEXINGTON County		SC-04	
ORANGEBURG County		SC-02	
RICHLAND County		SC-06	
<b>Source of labor: Contractors</b>			

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<b>Name: Carolina Community Actions, Inc.</b>		<b>Contact: Karen Brackett Browning, Exec. Director</b>	
<b>Address: P O Box 933</b>		<b>UEI: MNR3F6N2SME5</b>	
138 South Oakland Avenue		<b>DUNS: 071061212</b>	
Rock Hill, SC 29731-6933		<b>Phone: (803) 329-5195</b>	
<b>Counties served: YORK County</b>		<b>Fax: (803) 329-5198</b>	
LANCASTER County		<b>Email: kbrackett-browning@ccainc.org</b>	
CHESTER County		<b>Tentative allocation: \$ 189,492.00</b>	
UNION County		<b>Planned units: 13</b>	
FAIRFIELD County		<b>Type of organization: Local agency</b>	
		<b>Congressional districts served: CD</b>	
		SC-04	
		SC-05	
<b>Source of labor: Contractors</b>			

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<b>Name: Charleston County Human Services Commission dba Palmetto</b>		<b>Contact: Casdell E. Singleton, Exec. Director</b>	
<b>Address: 1069 King Street</b>		<b>UEI: JFYNKD7HD834</b>	
PO Box 20968		<b>DUNS: 180078052</b>	
Charleston, SC 29413-0000		<b>Phone: (843) 724-6760</b>	
<b>Counties served: CHARLESTON County</b>		<b>Fax: (843) 724-6787</b>	
DORCHESTER County		<b>Email: csingleton@palmettocap.org</b>	
JASPER County		<b>Tentative allocation: \$ 421,894.00</b>	
BEAUFORT County		<b>Planned units: 31</b>	
BERKELEY County		<b>Type of organization: Local agency</b>	
		<b>Congressional districts served: CD</b>	
		SC-01	
		SC-06	
<b>Source of labor: Agency and Contractors</b>			

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U.S. Department of Energy  
**WEATHERIZATION ASSISTANCE PROGRAM**  
**SUBGRANTEE INFORMATION**  
State: SC Grant Number: EE0009930 Program Year: 2024

Name: **Chesterfield-Marlboro**

Contact: Samuel D. Bass, Jr., Exec. Director

Address: 318-322 Front Street  
Cheraw, SC 29520-0000

UEI: H4KKYZ9X7J33

DUNS: 874970627

Phone: (843) 320-9760

Fax: (843) 320-9771

Email: [sdbass@cmeoc.org](mailto:sdbass@cmeoc.org)

Counties served: DARLINGTON County  
MARLBORO County  
DILLON County  
CHESTERFIELD County

Tentative allocation: \$ 140,536.00

Planned units: 10

Type of organization: Local agency

Source of labor: Contractors

Congressional districts served:

CD

SC-05

SC-07

Name: **GLEAMNS Human Resources Commission Inc**

Contact: Shunna T. Vance, Exec. Director

Address: P O Box 1326  
237 Hospital Street  
Greenwood, SC 29648-0000

UEI: S6MMXBQ98E68

DUNS: 078070497

Phone: (864) 223-8434

Fax: (864) 223-9456

Email: [svance@gleamnshrc.org](mailto:svance@gleamnshrc.org)

Counties served: GREENWOOD County  
NEWBERRY County  
CHEROKEE County  
SPARTANBURG County  
EDGEFIELD County  
ABBEVILLE County  
MCCORMICK County  
SALUDA County  
OCONEE County  
LAURENS County  
PICKENS County  
ANDERSON County

Tentative allocation: \$ 562,321.00

Planned units: 42

Type of organization: Local agency

Source of labor: Contractors

Congressional districts served:

CD

SC-05

SC-03

SC-04

Name: **Lowcountry Community Action Agency, Inc.**

Contact: Tara Glover Executive Director

Address: 1605 Jeffries Blvd  
Walterboro, SC 29488-0000

UEI: M4HNC173GJP5

DUNS: 071408165

Phone: (843) 549-5576

Fax: (843) 549-2190

Email: [tara.glover@lowcountrycaa.org](mailto:tara.glover@lowcountrycaa.org)

Counties served: COLLETON County  
HAMPTON County

Tentative allocation: \$ 37,494.00

Planned units: 3

Type of organization: Local agency

Source of labor: Contractors

Congressional districts served:

CD

SC-02

SC-06



U.S. Department of Energy  
**WEATHERIZATION ASSISTANCE PROGRAM**  
**SUBGRANTEE INFORMATION**  
State: SC Grant Number: EE0009930 Program Year: 2024

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Name: **Waccamaw Economic Opportunity Council, Inc.**

Contact: James L. Pasley, Jr., Exec. Director

Address: Post Office Box 1467  
1261 Hwy. 501 East, Suite B  
Conway, SC 29528-0000

UEI: L96VLJNNJNB8

DUNS: 130046845

Phone: (843) 234-4100

Fax: (843) 234-4111

Email: james.pasley@weoc.org

Counties served: WILLIAMSBURG County  
HORRY County  
GEORGETOWN County

Tentative allocation: \$ 232,664.00

Planned units: 16

Type of organization: Local agency

Source of labor: Contractors

Congressional CD

districts served: SC-06

SC-07

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Name: **Wateree Community Actions, Inc.**

Contact: Annette Tucker, Exec. Director

Address: 1915 Harden Street  
Columbia, SC 29204-0000

UEI: KCY9AB9Q74L5

DUNS: 086375599

Phone: (803) 807-9811

Fax: (803) 807-9810

Email: atucker@wcai.org

Counties served: KERSHAW County  
LEE County  
CLARENDON County  
MARION County  
SUMTER County  
FLORENCE County

Tentative allocation: \$ 250,408.00

Planned units: 18

Type of organization: Local agency

Source of labor: Contractors

Congressional CD

districts served: SC-06

SC-05

SC-07

**U.S. Department of Energy**  
Weatherization Assistance Program (WAP)  
**WEATHERIZATION ANNUAL FILE WORKSHEET**  
**Grant Number: EE0009930, State: SC, Program Year: 2024**  
**Recipient: South Carolina State of**

**IV.1 Subgrantees**

<b>Subgrantee (City)</b>	<b>Planned Funds/Units</b>
Aiken/Barnwell Counties Community Action Agency (Aiken)	\$748,426.00 55
Carolina Community Actions, Inc. (Rock Hill)	\$189,492.00 13
Charleston County Human Services Commission dba Palmetto (Charleston)	\$421,894.00 31
Chesterfield-Marlboro (Cheraw)	\$140,536.00 10
GLEAMNS Human Resources Commission Inc (Greenwood)	\$562,321.00 42
Lowcountry Community Action Agency, Inc. (Walterboro)	\$37,494.00 3
Waccamaw Economic Opportunity Council, Inc. (Conway)	\$232,664.00 16
Wateree Community Actions, Inc. (Columbia)	\$250,408.00 18
<b>Total:</b>	<b>\$2,583,235.00</b> <b>188</b>

**IV.2 WAP Production Schedule**

Weatherization Plans		Units
Total Units (excluding reweatherized)		188
Reweatherized Units		0
Average Unit Costs, Units subject to DOE Project Rules		
<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	188
C	Total Units Reweatherized	0
D	Total Dwelling Units to be Weatherized and Reweatherized (B + C)	188
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	\$1,568,347.00
G	Total Dwelling Units to be Weatherized and Reweatherized (from line D)	188
H	Average Program Operations Costs per Unit (F divided by G)	\$8,342.27
I	Average Vehicles & Equipment Acquisition Cost per Unit (from line E)	\$0.00
J	Total Average Cost per Dwelling (H plus I)	\$8,342.27

**IV.3 Energy Savings**

Method used to calculate savings: <input checked="" type="checkbox"/> WAP algorithm <input type="checkbox"/> Other (describe below)		
Units	Savings Calculator (MBtus)	Energy Savings

**U.S. Department of Energy**  
Weatherization Assistance Program (WAP)  
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This Year Estimate	188	29.3	5508
Prior Year Estimate	246	29.3	7208
Prior Year Actual	58	29.3	1699

**Method used to calculate savings description:**

**IV.4 DOE-Funded Leveraging Activities**

The State will not be leveraging any funds.

**IV.5 Policy Advisory Council Members**

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

Cathy Seawright	Type of organization: Unit of Federal Government Contact Name: Cathy Seawright Phone: 8432533093 Email: <a href="mailto:cathy.seawright@usda.gov">cathy.seawright@usda.gov</a>
Evans Taylor	Type of organization: Utility Contact Name: Evans Taylor Phone: 9197915906 Email: <a href="mailto:evans.taylor@duke-energy.com">evans.taylor@duke-energy.com</a>
Gretchen Pool	Type of organization: Unit of State Government Contact Name: Phone: 8037370800 Email: <a href="mailto:gpool@ors.sc.gov">gpool@ors.sc.gov</a>
Jennifer Moore	Type of organization: Non-profit (not a financial institution) Contact Name: Jennifer Moore Phone: 8037335421 Email: <a href="mailto:jmoore@uway.org">jmoore@uway.org</a>
John Frick	Type of organization: Utility Contact Name: John Frick Phone: 8037393064 Email: <a href="mailto:john.frick@ecsc.org">john.frick@ecsc.org</a>
Kaytee Watson	Type of organization: Utility Contact Name: Phone: 8032177942 Email: <a href="mailto:kaytee.watson@dominionenergy.com">kaytee.watson@dominionenergy.com</a>
Samuel D. Bass, Jr.	Type of organization: Local agency Contact Name: Phone: 8433209760 Email: <a href="mailto:sdbass@cmeoc.org">sdbass@cmeoc.org</a>
Trish Jerman	Type of organization: Other Contact Name: Trish Jerman Phone: 8033151609 Email: <a href="mailto:trish.jerman@gmail.com">trish.jerman@gmail.com</a>
Yvette Rowland	Type of organization: Utility Contact Name: Yvette Rowland Phone: 8037710220 Email: <a href="mailto:yvette.rowland@santecooper.com">yvette.rowland@santecooper.com</a>

**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
01/29/2024	A public hearing will be held on January 29, 2024 to review the Program Year 2024 Weatherization Assistance Program State Plan. Notice of the public hearing will be published in the statewide daily publication of The State Newspaper on January 18, 2024.

**U.S. Department of Energy**  
Weatherization Assistance Program (WAP)  
WEATHERIZATION ANNUAL FILE WORKSHEET  
**Grant Number: EE0009930, State: SC, Program Year: 2024**  
**Recipient: South Carolina State of**

**IV.7 Miscellaneous**

**Average Cost Per Unit (ACPU)**

The ACPU for PY 2022 is \$8,497.

**Recipient Principal Investigator**

Matthew Melton

matthew.melton@admin.sc.gov

803-734-9861

**Recipient Business Officer**

James Miller

james.miller@admin.sc.gov

803-734-0425

**Policy Advisory Committee Representation**

Sam Bass (Executive Director of Chesterfield-Marlboro Economic Opportunity Council) is the Community Action Agency representative on the PAC.

**U.S. Department of Energy**  
Weatherization Assistance Program (WAP)  
STATE PLAN / MASTER FILE WORKSHEET  
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**Recipient: South Carolina State of**

This worksheet should be completed as specified in Section III of the Weatherization Assistance Program Application Package.

**V.1 Eligibility**

**V.1.1 Approach to Determining Client Eligibility**

Provide a description of the definition of income used to determine eligibility

Definition of Income used to determine eligibility is consistent with DOE Weatherization Program Notice 23-3. Income means Cash Receipts earned and/or received by the applicant before taxes during applicable tax year(s), excluding the Income Exclusions listed below. Gross Income is to be used, not Net Income.

**Cash Receipts**

Cash Receipts includes the following: (1) money, wages, and salaries earned or received by the applicant before taxes/deductions during the applicable tax year(s); (2) net receipts from nonfarm or farm self-employment (receipts from a person's own business or from an owned or rented farm after deductions for business or farm expenses); (3) regular payments from Social Security, railroad retirement, unemployment compensation, strike benefits from union funds, worker's compensation, veteran's payments, training stipends, alimony, and military family allotments; (4) private pensions, government employee pensions (including military retirement pay), and regular insurance or annuity payments; (5) dividends and/or interest; (6) net rental income and net royalties; (7) periodic receipts from estates or trusts; and (8) net gambling or lottery winnings.

**Income Exclusions**

The following Cash Receipts are not considered Income: (1) capital gains; (2) any assets drawn down as withdrawals from a bank; (3) money from the sale of a property, house or car; (4) onetime payments from a welfare agency to a family or person who is in temporary financial difficulty; (5) tax refunds; (6) gifts, loans or lump sum inheritances; (7) college scholarships; (8) onetime insurance payments, or compensation for injury; (9) noncash benefits, such as the employer paid or union paid portion of health insurance; (10) employee fringe benefits, food or housing received in lieu of wages; (11) the value of food and fuel produced and consumed on farms; (12) the imputed value of rent from owner occupied nonfarm or farm housing; (13) depreciation for farm or business assets; (14) federal noncash benefit programs such as Medicare, Medicaid, food stamps, school lunches and housing assistance; (15) combat zone pay to the military; (16) child support (as further defined below); (17) reverse mortgages; and (18) payment for care of foster children.

In addition, earned income or unemployment compensation for minors under the age of 18 (or fulltime high school students) is not considered when determining the income eligibility of a household unit.

Child support payments from the applicant to another entity are not to be deducted for the purposes of determining applicant eligibility.

Describe what household eligibility basis will be used in the Program

**Determining Eligibility**

A household shall be determined eligible for Weatherization Assistance if:

1. the combined income for the family unit is at or below 200% of the federal poverty level (as updated in the annual federal poverty guidelines). OEO will follow WPN 22-5 and deem applicants eligible for means-tested HUD programs as income eligible for weatherization.
2. A household containing a member that received one of the following during the previous 12 months will also be deemed eligible for weatherization:

Cash assistance payments under Title IV (FIP)

Cash assistance payments under XVI of the Social Security Act (SSI)

No dwelling unit may be weatherized without documentation that household is income eligible and the dwelling unit is an eligible unit. South Carolina will follow LIHEAP Guidance on providing assistance to ineligible household members. Ineligible members (such as nonqualified aliens) will have their income counted in determining the household's total income. However, they will not count toward the household size. When the federal poverty levels are adjusted, OEO notifies the sub-grantees via memo (the 2024 memo is attached to this state plan). OEO also notifies LITT/DBA administrators to update the LITT/DBA systems with the latest levels.

**U.S. Department of Energy**  
Weatherization Assistance Program (WAP)  
STATE PLAN / MASTER FILE WORKSHEET  
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**Eligibility Documentation**

Income eligibility is determined by sub-grantees using the statewide LITT/DBA systems. Sub-grantees enter income information and household composition and LITT/DBA determines eligibility. Household eligibility documentation is available through LITT/DBA and Sub-grantee's records. Proof of income eligibility and associated documentation must be included and clearly identified in the client file in LITT/DBA. If income eligibility is determined by an outside entity, verification of that determination must be included in the client file in LITT/DBA (e.g., Section 8 documentation if determined eligible by the US Department of Housing and Urban Development).

Household eligibility documentation is available through the LITT/DBA systems and Sub-grantee's records. All weatherization requirements and changes are updated in LITT/DBA to ensure weatherization assistance program compliance by all sub-grantees. The LITT/DBA systems prevent weatherization services from commencing until the household is determined to be eligible. The LITT/DBA Eligibility Determination Date is used to determine when a client becomes eligible for weatherization. This safeguard ensures that all households receiving weatherization services are eligible. No dwelling unit may be weatherized without documentation that the household is income eligible and the dwelling unit is an eligible unit.

Income eligibility is determined by sub-grantees using the statewide LITT/DBA system. Sub-grantees are required to maintain a signed weatherization program application. All other documentation of client eligibility is uploaded to LITT/DBA. If weatherization services do not begin (an energy audit has not been initiated) within 12 months of the eligibility date, the household's eligibility must be re-determined.

South Carolina treats renters and owner occupied dwellings equally. Sub-grantees are to ensure eligible households are served according to their priority, whether or not the eligible household rents or owns the dwelling. The sub-grantee's procedures are reviewed by SC OEO's monitors. South Carolina's rental policy is specified in the Homeowner and Fuel Release Form 101. Within that document, the landlord agrees not to raise the rent as a result of increased value due to the weatherization completed on the dwelling for at least one year.

Renters have the right to appeal any rent increases they believe do not meet the requirement stated above. Any appeal must be stated in writing and must follow an appeal process as outlined in the current South Carolina's Weatherization Policies and Procedures Manual.

Describe the process for ensuring qualified aliens are eligible for weatherization benefits

South Carolina will follow the policies outlined in "Summary of Immigrant Eligibility Restrictions under Current Law as of 2/25/2009" and "HHS Guidance on the Use of Social Security Numbers (SSNs) and Citizenship Status Verification" to determine eligibility of qualified and nonqualified aliens.

The policy can be found at:

<https://aspe.hhs.gov/reports/summary-immigrant-eligibility-restrictions-under-current-law>

**V.1.2 Approach to Determining Building Eligibility**

Procedures to determine that units weatherized have eligibility documentation

Pursuant to 10 CFR Part 440.1: The purpose of the weatherization assistance program is to increase the energy efficiency of dwellings owned or occupied by low income persons.

10 CFR 440.3 defines a dwelling unit as a house, including stationary mobile home, an apartment, a group of rooms, or a single room occupied as a separate living quarters. 10 CFR Part 440.16(a): No dwelling unit may be weatherized without documentation that the unit is an eligible unit as provided in 440.22.

Sub-grantees are required to retain records of all dwellings that received Federal funds including LIHEAP, HUD, or USDA as part of "weatherization" activities. Dwellings may be re-weatherized after 15 years have passed since the completion of the original weatherization services.

Sub-grantees are required to complete, prior to any weatherization activity, a State Historic Preservation (SHPO) review for units 50 years of age or older at the time the work takes place, units that are historic properties, units that are in a designated historic area, or units where the age cannot be determined. South Carolina's SHPO Programmatic Agreement (PA) was amended to be valid until December 31, 2030.

**U.S. Department of Energy**  
Weatherization Assistance Program (WAP)  
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SC OEO's review of Sub grantee household files includes verification of SHPO review and re-weatherization status.

**Eligible Dwelling Units**

Structures eligible for weatherization include single family, manufactured housing (mobile homes), and both large (5+ units) and small (2-4 units) multifamily housing. 2-4 unit buildings are counted as Single Family residences in DOE reporting. All structures must be stationary and have a specific mailing (street) address. Campers and nonstationary trailers are not eligible. All dwellings to be weatherized must be owner or renter occupied, and occupied by a household:

1. Whose income is at or below 200 percent of the poverty level established by the U.S. Department of Health and Human Services, is eligible for means-tested HUD programs, or which contains a member who has received any one of the following at any time during the 12 month period preceding the application date for weatherization assistance: Cash assistance payments under Title IV (FIP) or XVI of the Social Security Act, (SSI);
2. Occupying a qualified rental dwelling unit in accordance with CSPM Item 608; or.
3. Occupying a shelter, group home or transitional facility in accordance with CSPM Item 608.1.

Describe Reweatherization compliance

No dwelling unit will be weatherized without documentation that the dwelling unit is an eligible unit, as defined in 10 CFR 440.22. Sub-grantees verify applicant's income during the application process and maintain records that include documentation of client's eligibility. Sub-grantees maintain records of previously weatherized dwelling units and previously weatherized dwellings are also included in LITT/DBA. The databases are checked prior to scheduling a household for service to ensure that the house has not been previously weatherized. If the house has been previously weatherized and is not eligible for re-weatherization, the house will not be weatherized and the client will be notified. If the house is eligible for re-weatherization, the sub-grantee makes a determination whether or not to re-weatherize the house based on the client's standing on the waiting list (see section V.3 for prioritization). Dwellings may be re-weatherized 15 years after the previous completed weatherization date. Sub-grantees maintain their own records of dwellings that may have received LIHEAP, HUD, or USDA weatherization funding and look for evidence of previous weatherization when onsite.

Describe what structures are eligible for weatherization

- Structures must be stationary and have a specific mailing address.
- Campers and nonstationary trailers are not eligible.
- Eligible Structures include single family dwellings, 2-4 unit buildings, manufactured homes (mobile homes), shelters, and Small and Large multifamily housing.

Small Multifamily is 5-24 units per building and Large Multifamily is 25+ units per building or if there are central mechanical systems serving more than one dwelling unit/building. 2-4 unit buildings are counted as Single Family residences in DOE reporting.

If energy savings cannot be realized due to the condition of a home, these conditions shall be documented in LITT/DBA and the home shall not be weatherized. Such energy audit conditions shall be brought to the attention of the client. The client will be referred to other organizations that may be able to assist them.

Describe how Rental Units/Multifamily Buildings will be addressed

**U.S. Department of Energy**  
Weatherization Assistance Program (WAP)  
STATE PLAN / MASTER FILE WORKSHEET  
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**Rental Units/Multifamily Buildings**

Single family rental dwellings and buildings with up to four units are addressed using the WA10 software.

Multifamily housing containing five or more units will be addressed by the sub-grantee submitting a proposal to DOE through OEO providing the project details. OEO will utilize the WAP Multifamily Case by Case Project Submittal Checklist (included as an attachment). Sub-grantees are required to enter into an agreement with landlords of multifamily properties. The agreement must state that rent on properties weatherized with DOE funds cannot be raised as a result of the increase in property value provided by weatherization services for 1 year. South Carolina uses the 66% percent eligible rule (50% for duplexes and four units) to determine multifamily eligibility for buildings not already verified as eligible by HUD and USDA.

**Landlord Contributions**

Sub-grantees may choose to require landlord contributions when weatherizing rental properties containing two to four units. The amount of financial participation is determined at the local level. Landlord participation can be used to buy down the SIR of a multifamily weatherization project in compliance with WPN 16-5 and WAP Memorandum 035. Landlord contributions for single family dwellings are not required but are optional and may be accepted.

**Homeowner, Fuel Release Form 101**

The sub-grantee will ensure a Homeowner, Fuel Release Form 101 is completed for each building containing a rental dwelling unit to be weatherized prior to the weatherization of any rental unit. This form includes all necessary information to allow the weatherization improvements to proceed in an expeditious and cost effective manner in accordance with DOE regulations and guidelines.

The Homeowner, Fuel Release Form 101 includes:

1. Owner/Agent certification that he/she will occupy either by themselves or an eligible tenant for at least one (1) year after the date the weatherization work is completed.
2. Owner/Agent agree that the quality of the installation of the materials cannot be guaranteed beyond a period of one (1) year.
3. The Tenant is the intended recipient of the benefits of the Weatherization Program.
4. Rent will not increase due to the improvements made by the weatherization work for a period of at least one (1) year.
5. Rent will not be raised unless it is clearly shown that any rent increase is not related to the weatherization work in any way.
6. The weatherization work will not increase the value of the rental units to an undue or excessive amount.
7. If rent includes utilities, the cost savings as a result of the weatherization work must be transferred to the tenant.

**Shelters**

South Carolina permits sub-grantees to weatherize shelters. The cost per unit is based on shelter regulations detailing that a weatherization provider may count each 800 square feet of the shelter as a dwelling unit or each floor level as one unit, as noted in 10 CFR 440.22(f).

The Sub-grantee may weatherize a shelter for long or short term residents, provided the owner or organization and residents of the dwelling units meet prescribed building and income eligibility requirements. Sub-grantees will document individual resident income verification unless there is such a high rate of turnover among residents that documentation of individual resident eligibility is impractical. In that case, Sub-grantees will need to supply the following to SC OEO:

1. Standard Application;
2. A signed statement from the facility operator attesting that the individuals/households residing in the facility are income eligible;
3. A copy of the organization's income guidelines or a copy of the organization's mission statement in lieu of individual resident income verification;
4. Documentation that the facility is a nonprofit organization and a copy of the organization's bylaws; and
5. Proof of benefit accrual to the low income tenant(s).



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Job files must include all applicable client file information required and a copy of the written approval by the SC OEO staff for the weatherization of any shelter.

Describe the deferral Process

Deferrals may take place during any phase of the weatherization process, including but not limited to: Intake/eligibility, pre-weatherization inspection/walkthrough, Energy Audit, or in-process weatherization activity. Postponement of work is advisable until problems can be resolved and/or alternative sources of assistance are identified.

Subgrantees track deferrals using the LITT/DBA database. Documentation regarding the reason for deferral is required in the client file and sub-grantees must communicate the specific reason for deferral to the client using Form 107 Deferral of Service Notification. Subgrantees are encouraged to collaborate with their state technical monitor to make decisions regarding deferral.

South Carolina recognizes there are some deferral issues that would not be helped with additional funding. These include:

- Building for sale or foreclosure.
- Remodeling work in process that prohibits weatherization.
- Health negatively affected by installation.
- Refused installation of weatherization measure.
- Illegal activity concerns.
- Threatening or uncooperative behavior.
- Refusal of ASHRAE 62.2 2016 ventilation requirements.
- Refusal to remove unsafe combustion appliances.

Listed below are examples of deferral issues (including underlying issues that the specific repair could correct) that could potentially be fixed with additional funding.

1. Roof, ceiling, wall (interior and/or exterior), floor, or foundation/subspace repair needed to address: mold/moisture, sewage, pest infestation, or damage that prohibits effective weatherization.
2. Plumbing repair needed to address: mold/moisture, sewage, pest infestation, or other issues.
3. Electrical repair needed to address: issues that prohibit effective weatherization (e.g. cannot insulate walls due to knob & tube wiring), safety hazards or other issues.
4. Cleanup or remediation required beyond the scope of weatherization to address: mold/moisture, sewage, suspected asbestos containing materials (attic, walls, etc.), lead paint, pest infestation, clutter restricting access to necessary areas or other issues.
5. Exterior draining repairs (e.g. landscaping or gutters) needed to address: mold/moisture, sewage or other issues.

When possible, sub-grantees are encouraged to use Weatherization Readiness Funds (or other alternative funds), make referrals, or collaborate with other programs. However, if Weatherization Readiness Funds are not available, it is the client's responsibility to correct the condition(s) causing the deferral in order for weatherization services to proceed. When the conditions causing the deferral have been addressed, clients are asked to contact the sub-grantee to reevaluate the home. These clients are then given top priority to receive services and are not placed back on the wait list.

**Weatherization Readiness Fund Plan**

To address deferral issues in Program Year 2024, OEO will use the Weatherization Readiness Fund (WRF) Plan as described below.

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South Carolina will receive \$289,405 in WRF for Program Year 2024. Each sub-grantee will receive a WRF allocation as outlined below.

<b>Subgrantee</b>	<b>WRF Allocation</b>
Aiken-Barnwell Counties Community Action Agency	\$83,848
Carolina Community Action, Inc.	\$21,229
Charleston County Human Services Commission dba Palmetto CAP	\$47,266
Chesterfield-Marlboro Economic Opportunity Council, Inc.	\$15,744
GLEAMNS Human Resources Commission, Inc.	\$62,998
Lowcountry Community Action Agency, Inc.	\$4,200
Waccamaw Economic Opportunity Council, Inc.	\$26,066
Wateree Community Actions, Inc.	\$28,054

**WRF Maximum**

Sub-grantees can spend up to \$10,000 of WRF money to prepare a dwelling for weatherization without written approval from OEO. If a dwelling requires more than \$10,000 to prepare for weatherization, sub-grantees may supplement the WRF money with additional non-federal funds or request written approval to exceed the \$10,000 WRF limit.

**WRF Prioritization of Dwellings**

Sub-grantees should prioritize dwellings in need of WRF on a first come, first served basis. After clients are deemed eligible for weatherization services (including the prioritization of Elderly Persons, Families with Children, Persons with Disabilities, High Residential Energy Users, and High Energy Burden), they can be eligible for WRF on a first come, first served basis. For WRF money to be expended an Energy Audit must be performed on the dwelling. As such, issues dealing with the safety and well-being of the auditor or general inaccessibility of areas in the dwelling (clutter) cannot be addressed with WRF. Once an Energy Audit is performed and the home is determined to be eligible for DOE weatherization (SIR of 1.0 or greater), the Energy Auditor must determine if both:

The dwelling would normally be deferred as structural, health and safety, or other issues outside the scope of weatherization exist.

And

The dwelling can be made ready for weatherization with an investment of \$10,000 (can request to exceed \$10,000 limit) or the remaining balance in the sub-grantee's WRF, whichever is less.

If the dwelling cannot be made ready for weatherization, it should be deferred. If it can be made ready for weatherization, the sub-grantee should notify OEO in writing of their plans to use WRF money on the dwelling.

**WRF Process**

Once it has been determined that WRF money will be used on a dwelling, the sub-grantee must document the actions to be taken to make the dwelling ready for weatherization, the entity performing the work, and the cost of the work. The information will be documented on Form 120 Weatherization Readiness. All dwellings that receive pre-weatherization measures must receive an independent inspection to ensure the measures were installed correctly and the dwelling is safe. OEO anticipates this inspection will be conducted by a city or county inspector in the jurisdiction. Sub-grantees must obtain written approval from OEO to use an entity other than the county or city inspector to conduct the inspection. Sub-grantees must verify and document the inspector is credentialed and qualified to conduct the inspection. Sub-grantees must include these credentials as well as copies of any paperwork used by the inspector (i.e., county inspection form) in the client file and complete Form 120 verifying the work done on the dwelling passed inspection. The contractor that performed the readiness work will not be paid until their work receives a passing inspection. Once the readiness work has been completed and the contractor has been paid, the sub-grantee should upload the relevant information (before and after pictures, contractor receipts, etc.) in LITT or FACSPRO and notify OEO.

Once the readiness work receives a passing inspection, the sub-grantees should perform an Energy Review on the dwelling to ensure the entries in the Energy Audit have not changed before beginning weatherization work.

**Restrictions on WRF Money**

Any dwelling that receives WRF money must result in a DOE completion (either for the annual formula grant or BIL). This means at least one Energy Conservation Measure (ECM) using DOE funds must be installed in the dwelling. OEO understands there may be rare instances where a dwelling receiving WRF money does not result in DOE completion (client moves or becomes non-responsive, client passes away, natural disaster occurs, etc.). OEO will consult with DOE and the sub-grantee regarding next steps should these situations arise.

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WRF money must be tracked separately from other DOE funds. As such, WRF money cannot be spent on an ECM, Incidental Repair Measure (IRM) or other Health and Safety measure. WRF money must be expended before other weatherization measures (ECMS, IRMs, Health and Safety) are installed.

**Repairs Eligible for WRF Money**

The following is a non-comprehensive list of repairs that are eligible for WRF money. Items not on this list can be implemented based on the discretion of the sub-grantee after discussions with and written approval from OEO.

- Roof repair;
- Wall repair;
- Ceiling repair;
- Floor repair;
- Foundation repair;
- Plumbing repair;
- Electrical repair;

Other repairs, specifically landscaping, asbestos remediation, and lead paint remediation are not eligible for WRF money but can be completed with other non-federal funds at the discretion of the sub-grantee.

**WRF Tracking**

WRF money will be tracked in two ways. OEO will track dwellings receiving WRF in real-time as they are notified by sub-grantees (see attached tracking spreadsheet) and LITT/DBA will track WRF money as jobs are completed and closed out.

**WRF Monitoring**

OEO will collect and report the following information in its annual monitoring of sub-grantees.

1. Number of dwellings receiving WRF money by sub-grantee and dwelling type (site built or manufactured)
2. Amount of WRF money spent by sub-grantee and dwelling type
3. Amount of WRF money spent per dwelling by sub-grantee
4. Nature of repairs (roof, plumbing, floors, electrical, etc.) by sub-grantee and dwelling type
5. For site-built dwellings, the year constructed
6. Other funds used to ready dwellings for weatherization where applicable

OEO will also ensure each dwelling that receives WRF money results in a DOE completion.

**V.1.3 Definition of Children**

Definition of children (below age): **18**

**V.1.4 Approach to Tribal Organizations**

Recommend tribal organization(s) be treated as local applicant?

If YES, Recommendation. If NO, Statement that assistance to low-income tribe members and other low-income persons is equal.

Low-income members of Indian tribes will receive benefits equivalent to the assistance received by other low-income persons within the state.

**V.2 Selection of Areas to Be Served**

Weatherization Assistance is provided to all forty-six (46) counties in South Carolina by 8 community action agencies (sub-grantees). The Weatherization Assistance Program is to be administered locally by community action agencies, per S.C. Code §4852440. CAAs are the statutorily mandated WAP sub-grantees in South Carolina. South Carolina Code of Laws SECTION 583750 (m)(1)(b) states "the

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Weatherization Assistance Program, created by Title IV of the Energy Conservation and Production Act of 1976 and codified as Part A, Subchapter III, Chapter 81, Title 42 of the United States Code, amended by the National Energy Conservation Policy Act, the Energy Security Act, the Human Services Reauthorization Act of 1984, and the State Energy Efficiency Programs Improvement Act of 1990 and administered and funded by the United States Department of Energy on the federal level and administered locally by community action agencies.” The local community action agency is responsible for administration and implementation of the program. Preference is given to any community action agency which has, or is currently administering, an effective program under 10 CFR 440 or under Title II of the Economic Opportunity Act of 1964. Funds are allocated based upon the most recent Census poverty population data in the counties the sub-grantees serves.

The eight sub-grantees chosen to perform weatherization work in South Carolina are:

**1. Aiken/Barnwell Counties Community Action Agency, Inc.**

Counties - Aiken, Allendale, Bamberg, Barnwell, Calhoun, Greenville, Lexington, Orangeburg, Richland

**2. Carolina Community Actions, Inc.**

Counties - Chester, Fairfield, Lancaster, Union, York

**3. Charleston County Human Services Commission dba Palmetto Community Action Partnership**

Counties - Beaufort, Berkeley, Charleston, Dorchester, Jasper

**4. Chesterfield-Marlboro Economic Opportunity Council, Inc.**

Counties - Chesterfield, Darlington, Dillon, Marlboro

**5. GLEAMNS Human Resources Commission, Inc.**

Counties - Abbeville, Anderson, Cherokee, Edgefield, Greenwood, Laurens, McCormick, Newberry, Oconee, Pickens, Saluda, Spartanburg

**6. Lowcountry Community Action Agency**

Counties - Colleton, Hampton

**7. Waccamaw Economic Opportunity Council, Inc.**

Counties - Georgetown, Horry, Williamsburg

**8. Wateree Community Actions, Inc.**

Counties - Clarendon, Florence, Kershaw, Lee, Marion, Sumter

**DESIGNATION/RE-DESIGNATION OF ELIGIBLE WAP ENTITIES IN UNSERVED AREAS**

In the event that an agency voluntarily chooses to stop providing weatherization services, funding is at risk due to performance issues which cannot be resolved in a timely manner, or the agency is in breach of the WAP grant agreement with the State, OEO will extend the geographic service area of another eligible CAA and/or submit a Request for Proposal and bid for a new eligible CAA. This will be done, as necessary, to provide services to the low-income population in that service area and shall be administered in accordance with existing Federal and State legislation. Removal of the program from the sub-grantee will not be done until a suitable organization can be found to administer the program, either on a temporary or permanent basis.

The re-designation of the unserved area shall be granted to a CAA which has demonstrated effectiveness in meeting the goals and purposes of WAP. OEO will take into consideration the extent to which an eligible CAA achieved or is achieving weatherization goals in a timely fashion, quality of work performed, the qualification and experience of the sub-grantee’s staff members, and the agency’s current geographic service area.

**V.3 Priorities**

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South Carolina prioritizes WAP clients based on five categories. In LITT/DBA, 20 points are assigned for each priority classification a household possesses. LITT/DBA calculates the total points. Households with the highest points are selected by sub-grantees for weatherization. Points are awarded based on the following classifications.

- 20 points - Households containing at least one member who is 60 years of age or older.
- 20 points - Households containing at least one member who is disabled (as determined by Social Security, Veteran's Affairs, Vocational Rehabilitation, or another governmental agency).
- 20 points - Households containing at least one child under 18 years of age.
- 20 points - Households with a High Energy Burden. This is defined by South Carolina as a household that spends at least 20 percent of their household income on energy usage.
- 20 points - Households that are considered High Energy Users. This is defined by South Carolina as a LIHEAP eligible household (income less than or equal to 150% of the Federal Poverty Level).

**Time Period for Income Verification**

Applications must be recertified after a 12-month period.

**V.4 Climatic Conditions**

South Carolina's climate is classified as humid sub-tropical. Temperatures vary seasonally, with summers generally hot and sultry while winters are mild, and precipitation is ample and fairly well distributed throughout the year. Although March and July are usually the wettest months of the year, there is no real dry season. In eastern South Carolina, however, winter precipitation is greater than summer precipitation. Statewide, minimum precipitation is received in October and November. During summer and early fall of most years, the state receives the effects of one or more tropical storms or hurricanes.

Our demand for electricity is rather sensitive to the weather. Changes in the weather patterns mean changes in energy consumption.

Listed below are the South Carolina weather stations and associated heating and cooling degree days.

**Note:** SC annual heating and cooling degree days based on January 1, 2023 through December 1, 2023.

Base temperature = 65°F.

Greenville, SC - Greenville Downtown (KGMU)

Heating Degree Days – 1,834

Cooling Degree Days – 1,854

Columbia, SC - Metropolitan Airport (KCAE)

Heating Degree Days – 1,719

Cooling Degree Days – 2,240

Charleston, SC - Charleston International Airport (KCHS)

Heating Degree Days – 1,145

Cooling Degree Days – 2,567

Source: [www.degreedays.net](http://www.degreedays.net) (using temperature data from [www.wunderground.com](http://www.wunderground.com))

**V.5 Type of Weatherization Work to Be Done**

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**V.5.1 Technical Guides and Materials**

**Technical Guides and Materials**

1. Standard Work Specification (SWS). South Carolina will follow the SWS when weatherizing client homes.
2. South Carolina Weatherization Field Guide (SC Field Guide) for Site-Built and Manufactured Housing was approved by the Department of Energy on September 14, 2021. All tasks performed on client homes will meet the specifications, objectives and desired outcomes outlined in the SC Field Guide. The SC Field Guide was posted to the OEO's website and sub-grantees were notified via email regarding its approval and how to access. Sub-grantees signed a form acknowledging receipt of the SC Field Guide (included as an attachment to the State Plan)
3. DOE and NREL guidance. All weatherization work will be performed in accordance with U.S. Department of Energy approved procedures and materials listed in 10 CFR 440 Appendix A. Sub-grantees must perform all work according to the National Renewable Energy Laboratory
4. SC Weatherization Policies and Procedures Manual (SC WAP Manual). The SC WAP Manual contains guidance on how to implement administrative and field requirements. Field guidance focuses on installation techniques, proper methods of testing, health and safety requirements, and data collection and submission. Administrative guidance focuses on training plans and schedules, data collection and submission, and contract language and wording to communicate requirements and specifications
5. Sub-contractor agreements. OEO contracts with sub-grantees specify all sub-contractor agreements must contain the following language:

*The Contractor shall, in a satisfactory and proper manner, install weatherization materials and equipment on designated units according to specifications approved by the Agency and in compliance with rules, regulations, and standards set forth in the Weatherization Assistance Program and enforced by the Department of Energy and the South Carolina Office of Economic Opportunity. If the Contractor's workmanship fails to meet the required standard, the Contractor must complete the work to standards at no additional cost to the Agency and the Agreement may be revoked by the Agency.*

*The Sub-grantee shall perform weatherization services during the Term in accordance with the US Department of Energy Weatherization Assistance Program State Plan for the State of South Carolina, the South Carolina Weatherization Field Guide, Standard Work Specifications, the South Carolina Weatherization Policy and Procedures Manual, other State Weatherization directives as applicable, and any amendments thereto. The Sub-grantee's signature on the Grant Agreement signifies its responsibility to follow all work standards as outlined in the documents referenced in this paragraph.*

**Incidental Repair Measures (IRMs)**

- Defined in the South Carolina Weatherization Assistance Program Health and Safety Plan and SC WAP Manual.
- Maximum amount of spending with DOE funds for incidental repairs is limited to \$500 maximum per dwelling.
- Incidental repairs are directly associated with an Energy Conservation Material (ECM).
- The Total Cost of all IRMs, not to exceed \$500 of DOE funds is added to the cost of the package of weatherization measures to calculate the whole unit (SIR).
- LWAP funds can supplement the \$500 DOE IRM maximum, but the SIR must still be 1.0 or greater to spend DOE money to weatherize the dwelling.
- Ineligible measures that do not meet the incidental repair definition, includes Lead Safe Work and Testing; Asbestos testing, encapsulation, or mitigation; Removing pollutants; or Radon Testing.

**Energy Audit Procedures**

**Single Family Buildings**

- National Energy Audit (NEAT) approved August 26, 2019.
- NEAT will be used to determine the cost effectiveness of all single family, site built family homes.
- In accordance with WPN 23-6, South Carolina will submit a proposed Energy Audit to DOE by February 16, 2024. This proposed Energy Audit will outline the functionality of LITT which uses an API to produce audits using the Weatherization Assistant 10 engine for single family homes.

**Manufactured Housing**

- Manufactured Home Energy Audit (MHEA) approved August 26, 2019
- MHEA will be used to determine the cost effectiveness of all manufactured housing.
- In accordance with WPN 23-6, South Carolina will submit a proposed Energy Audit to DOE by February 16, 2024. This proposed Energy Audit will outline the functionality of LITT which uses an API to produce audits using the Weatherization Assistant 10 engine for manufactured homes.

**Multifamily**

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- No approved audit.
- Multifamily Eligibility
  - Per 10 CFR 440.22(b), multifamily buildings may be weatherized when 66 percent (50 percent if a two or four unit building) of the dwelling units in the building are eligible households or will become eligible within 180 days due to a federal, state, or local government program for rehabilitation of the building or making similar improvements. Determination of eligibility shall use the financial assistance guidelines to determine eligibility.
  - If the entire building is not eligible for weatherization because there are not enough units to meet the 66% (or 50%) eligibility criteria, weatherization service to the entire building shall be denied.
  - Sub-grantees shall weatherize the entire multifamily building when the building is eligible.
  - Sub-grantees shall obtain a signed authorization form from the property owner/landlord or their designated agent authorizing the work to be done and agreeing to the property owner/landlord's financial participation.
  - Sub-grantees must use the Weatherization Application Form and the Homeowner Fuel Release Form 101 for each rental weatherization project.
    - Sub-grantee shall develop a detailed description/work order of the measures to be completed and the costs assigned to the property owner/landlord and the sub-grantee/program.
    - The agreement shall include language whereas the property owner/landlord agrees not to raise the rent for at least one year from the time the work is completed, unless the increase is based on factors unrelated to the weatherization improvements.
    - The client shall be provided a copy of the signed agreement.
    - No undue or excessive enhancements shall accrue to the value of the weatherized dwelling units.
    - The maximum amount of grant funds that can be spent for weatherization is determined by the number of eligible units in the building, multiplied by the average cost per unit. This is the maximum amount that can be spent on the entire building.

**Five or More Unit Multifamily Buildings**

Sub-grantees must provide a preliminary assessment of the multifamily buildings with 5 units or more and submit the request to OEO. Sub-grantees will use the Multi-family Case by Case Project Submittal Checklist when developing the request. OEO will then review/submit the plans and request permission from the DOE Project Officer to proceed.

**The preliminary assessment is to include the following:**

- Identify the certified multifamily Energy Auditor(s).
- Identify the QCI(s)
- Identify the proposed multifamily energy audit program.
- Document how tenants will be notified of the WAP and the Health and Safety requirements (lead, mold, radon, and other health and safety issues).
- A commitment letter from the property owner/landlord showing the possible owner contributions.
  - If owner/landlord is responsible for paying heating costs or the units are master-metered, owner/landlord may be required to contribute up to 15 percent of the total weatherization work.
  - If the tenant is responsible for paying heating costs, the owner/landlord may be required to contribute up to 10 percent of the total weatherization work.
  - In addition, if the heating/cooling systems are being replaced, the owner/landlord must contribute 25 percent of the replacement cost of the heating/cooling system.
  - The contribution may be met in the following ways:
    - Cash contribution.
    - Rebate or rent reduction (rebate cannot exceed one year)
    - Donation of weatherization materials.
    - An exception is made for owners/landlords who themselves are eligible for the weatherization program. These owners are not required to make a contribution.
- Notification to affected eligible households that the rent cannot be increased for a period of at least one year.
- Notification to tenants of the owner contributions in the form of rebates and rent reductions, when this is applicable.
- Notification to tenants of the formal complaint process.

**Property Documents to be covered during preliminary process**

- Weatherization Application for all eligible households.
- Homeowner/Fuel Release Form #101 for all eligible households.
- Detailed scope of work highlighting the proposed weatherization measures and any energy problem areas.
- Matching funds, if applicable for weatherization work.
- Description of other funds the owner may be using for other repair and/or renovations.
- Project schedule.

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- Net energy savings / benefits potential. This is based upon historical or expected energy savings or benefits, prior to the actual audit being completed on the building.

Field guide types approval dates

Single-Family: 9/14/2021
Manufactured Housing: 9/14/2021
Multi-Family:

**V.5.2 Energy Audit Procedures**

Audit Procedures and Dates Most Recently Approved by DOE

Audit Procedure: Single-Family
Audit Name: NEAT
Approval Date: 8/26/2019

Audit Procedure: Manufactured Housing
Audit Name: MHEA
Approval Date: 8/26/2019

Audit Procedure: Multi-Family
Audit Name:
Approval Date:

Comments

South Carolina will continue to require all single family and manufactured homes have a NEAT and MHEA audit to determine cost effective measures to be installed. In accordance with WPN 23-6, South Carolina will submit a proposed Energy Audit to DOE by February 16, 2024. This proposed Energy Audit will outline the functionality of LITT which uses an API to produce audits using the Weatherization Assistant 10 engine for single family (NEAT) and manufactures homes (MHEA).

Only measures that are cost effective showing, a SIR of 1.0 or greater may be installed with DOE funds. Measures with an SIR of 1.0 or greater are determined to be cost effective, meaning the lifetime savings produced by the measure is greater than the total cost of installation. Measures with an SIR of 0.5 or greater may be installed with LIHEAP or other braided funds assuming the entire SIR of the project is 1.0 or greater.

**SINGLE FAMILY HOMES and MULTIFAMILY (2 - 4 units per building)**

South Carolina's basic housing types for single family homes are as follows:

- Type A – Wood-framed with vented crawlspace and unfinished attic
- Type B – Wood-framed with non-conditioned basement and unfinished attic
- Type C – Wood-framed with uninsulated slab and unfinished attic
- Type D – Wood-framed with vented crawlspace and kneewall attic
- Type E – Wood-framed with non-conditioned basement and kneewall attic
- Type F – Wood-framed with uninsulated slab and kneewall attic
- Type G – Masonry with vented crawlspace and unfinished attic
- Type H – Masonry with uninsulated slab and unfinished attic

The Weatherization Assistant National Energy Audit Tool (NEAT) from Weatherization Assistant 10 will be used to determine cost effective measures for all single family homes.

**Manufactured Homes**

South Carolina's basic housing types for manufactured homes are as follows:

- Type A - Pitched Roof with non-vented walls and length wise floor joists



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- Type B - Pitched Roof with non-vented walls and width wise floor joists
- Type C - Pitched Roof with vented walls and length wise floor joists
- Type D - Pitched Roof with vented walls and width wise floor joists
- Type E - Bowstring Roof with non-vented walls and length wise floor joists
- Type F - Bowstring Roof with non-vented walls and width wise floor joists
- Type G - Bowstring Roof with vented walls and length wise floor joists
- Type H - Bowstring Roof with vented walls and width wise floor joists
- Type I - Flat Roof with non-vented walls and length wise floor joists
- Type J - Flat Roof with non-vented walls and width wise floor joists
- Type K - Flat Roof with vented walls and length wise floor joists
- Type L - Flat Roof with vented walls and width wise floor joists

The Weatherization Assistant Manufactured Housing Energy Audit (MHEA) from Weatherization Assistant 10 will be used to determine cost effective measures for manufactured housing.

**MULTIFAMILY (5+ units per building)**

South Carolina does not have an approved audit for weatherizing multifamily buildings containing 5 or more units.

**Regional Priority List**

OEO received approval from DOE on August 29, 2022 to implement the Regional Priority List (RPL) for single family site-built and manufactured homes. The RPL includes preapproved weatherization measures that can be installed in eligible dwelling units without an Energy Audit being conducted. OEO met with sub-grantees and FACSPRO staff to develop procedures, update forms, and make changes to FACSPRO to implement the RPL. On December 28, 2022, OEO authorized sub-grantees to use the RPL to weatherize eligible dwellings. The RPL is optional and sub-grantees can continue to use the existing Energy Audit procedures to weatherize dwellings that meet the criteria to use the RPL. The memo, the specific RPL Policies and Procedures, and new and updated forms are attached to the South Carolina 2024 Weatherization Assistance Program State Plan. The RPL will continue to be available for use by sub-grantees when South Carolina transitions to LITT on April 1, 2024.

**V.5.3 Final Inspection**

Sub-grantees are required to perform an independent quality control inspection after weatherization work is completed on each dwelling. This inspection must occur, and be documented, before reporting the project to the State as a "completed unit". This process is to ensure that all work performed meets or exceeds the minimum specifications outlined in the SWS in accordance with 10 CFR 440.16(g) as well as any local building codes or requirements. All supporting documentation including inspection forms, work orders, and Recommended Measure Reports (RMR), will be maintained in the client's file.

The inspection must be performed by a certified Quality Control Inspector (QCI). The QCI evaluates the work performed against the RMR and Work Order, records/reports findings and concerns, and specifies corrective actions. This is done by conducting a methodological audit/inspection of the building, performing safety and diagnostic tests, and by observing the retrofit work in order to ensure the completion, appropriateness and quality of the work providing for the safety comfort and energy savings of the building occupants. The QCI will also interview the building occupants to alleviate any concerns they have regarding the weatherization process and ensure the crews or contractors performing the work were courteous and respectful.

The QCI will also ensure all installed measures align with the SWS and the South Carolina Weatherization Field Guide. The QCI will review the original Energy Audit including data inputs, test (blower door, CAZ, etc.) results, and photographs (before, in-progress, and after). The QCI will review the Work Order to ensure adequate guidance was provided to the crew or contractor that installed the measures and evaluate any change orders to ensure all measures are justified either by the SIR or Health and Safety requirements.

While this may not always be possible with schedules and the size of some sub-grantees, OEO encourages the QCI to schedule in-progress visits when possible. During these in-progress visits, the QCI can connect with the crew or contractor, observe any potential complexities, discuss any issues with the work, and participate in the weatherization process.

The quality control inspection will include a completed and signed Data Collection/Final Inspection Form 501. This form should include data from each test the QCI runs after the weatherization work is performed (blower door, pressure pans, ASHRAE fan settings, etc.). Any outstanding Health and Safety issues or required reworks will be noted on this form and relayed to the crew or contractor. Once the dwelling receives a satisfactory inspection from the QCI, a signed copy of the QCI Final Inspection Certification Form 600 will be added to the client file. All invoices related to the weatherization work will also be included in the client file. The QCI should review this information to ensure no

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measures were billed incorrectly, work is accounted for, and all fiscal requirements (SIR, DOE limits on Incidental Repairs and Health and Safety measures, etc.) are met.

All of the sub-grantees have at least one QCI on staff. Below is the list of sub-grantees and the total QCIs on staff.

Subgrantee	QCI (s) on Staff
Aiken/Barnwell Counties Community Action Agency, Inc.	7
Carolina Community Actions, Inc.	2
Chesterfield-Marlboro Economic Opportunity Council, Inc.	1
GLEAMNS Human Resources Commission, Inc.	2
Lowcountry Community Action Agency, Inc.	1
Charleston County Human Services dba Palmetto Community Action Partnership	2
Waccamaw Economic Opportunity Council, Inc.	3
Wateree Community Actions, Inc.	1

Seven of the eight sub-grantees utilize contractors to install weatherization measures. Palmetto utilizes a hybrid model. Crews and contractors both install weatherization measures. However, the quality control inspectors are not part of the crew and do not directly install weatherization measures. Therefore, all weatherization measures installed in South Carolina receive a Quality Control Inspection from an independent source that did not directly install the weatherization measures.

SC OEO's QCI certified inspectors will monitor (at least) 10 percent of the completed units and accompanying client files for each sub-grantee until the sub-grantee has an independent assessor and QCI in place. Sub-grantees are required to ensure that each Weatherization completion receives an appropriate and properly executed final inspection. This inspection must be performed by a certified Quality Control Inspector (QCI). As part of their regular monitoring procedure, OEO will review final inspection forms, sub-grantee inspection processes, and completed homes to ensure the inspections are being performed correctly and in a manner that is consistent with DOE expectations as outlined in WPN-22-4.

For sub-grantees that do not have an independent Energy Auditor and Quality Control Inspector, OEO encourages them to contract the Energy Audit or Quality Control Inspection for a percentage of their jobs out to another certified individual within the network.

When OEO's QCI identifies SWS discrepancies, corrections must be performed using nonfederal funds. Should monitoring reveal repeat SWS discrepancies or poorly performed inspections, OEO will place the sub-grantee on a corrective action plan. Should the corrective action plan fail to correct the issue, OEO will seek stiffer actions as allowed in the Weatherization Sub-grantee Grant Agreement. Failure by the sub-grantee to utilize the QCI process correctly may result in all associated costs being disallowed and funds returned to OEO.

**V.6 Weatherization Analysis of Effectiveness**

The state requires that pre and post-weatherization inspections include use of diagnostic equipment such as a blower door, combustion analyzer, etc. Sub-grantees must utilize ASHRAE 62.2 (2016) for determining the proper ventilation for single-family and manufactured dwellings. Sub-grantees are not allowed to report units as completed until a final inspection is performed and the work has been accepted and approved by a Quality Control Inspector.

Program production, goal attainment, and expenditure costs will be tracked on a monthly basis for each sub-grantee at the State level using LITT/DBA. OEO will utilize LITT/DBA to track weatherization work performed on dwellings.

The routine monitoring process will confirm that measures are performed and tracked according to program standards, and that diagnostic and health and safety tests are performed and documented correctly on the Data Collection and Final Inspection Form 501.

SC WAP maintains files on the sub-grantees that include the Grant Agreements, monthly financial status reports, and related information from which staff can obtain a current and complete financial picture of the sub-grantee. The information kept in the files provides an updated picture of how each sub-grantee is meeting contractual responsibilities.

OEO conducts production quota meetings with sub-grantees monthly. Sub-grantees not meeting quarterly production goals are contacted by

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state staff and required to provide a production plan to support meeting prescribed quarterly goals and ensuring completion of the contractually required number of DOE houses by the end of the program period. This plan will include any additional training or technical assistance needs that may hinder the sub-grantee in meeting production goals. Sub-grantees that fail to achieve the production quota agreed to by the community action agency and OEO may have DOE administrative funding reduced in the following program year. This reduction will at no time reduce the allocation for administration below the DOE mandated 5%. Additionally, if agencies fail to achieve the production quota for a period of two consecutive years, OEO reserves the right to rebid the selected service area.

Training and technical assistance needs are determined during the onsite monitoring of each sub-grantee. By compiling the results of the production and monitoring reports, the state office determines what T&TA activities can be provided through peer to peer coordination or made available statewide.

**Addressing Diversity, Equity, and Inclusion (DEI)**

OEO encourages sub-grantees to include DEI in their weatherization activities. Sub-grantees complete monitoring documents before each visit and return these to OEO. These documents ask if sub-grantees make efforts to recruit women, minorities, and veterans for their contractors and employees. They also ask for any special accommodations sub-grantees provide to potential applicants or clients. This may include things like having forms in Spanish or having translators present to alleviate communication issues.

OEO and its sub-grantees do not discriminate against employees, contractors or applicants based on race, nationality, religion, gender identity, sexual orientation, age, or disability,

Sub-grantee funding allocation is based on the most recent census date which includes poverty levels for each county. This allocation ensures that areas with higher concentrations of poverty receive more DOE funding.

**Sub-grantee Default, Suspension, Transfer / Termination**

The OEO may, by giving reasonable written notice specifying the effective date, terminate this grant to a sub-grantee in whole or in part for cause. Such cause may include:

- Failure, for any reason, of the sub-grantee to fulfill in a timely and proper manner its obligation under this grant including compliance with the approved work program and attached conditions, and such statutes, executive orders, and DOE and/or OEO directives as may become generally applicable at any time;
- Late submission by the sub-grantee to the OEO of DOE reports;
- Submission to the OEO of DOE reports that are incorrect or incomplete;
- Ineffective or improper use of funds provided under this grant;
- Suspension or termination by DOE of the grant to the state under which this grant is made, or the portion thereof delegated by this grant. The state may also assign and transfer this grant as required by DOE directives.
- Suspension or termination by DOE of the grant to a sub-grantee.

The state may also assign and transfer this grant as required by DOE directives. If the sub-grantee is unable or unwilling to comply with the terms of this grant or with additional conditions as may be lawfully applied by DOE to the grant, or the state, the sub-grantee may terminate the grant by giving thirty (30) days written notice to the state signifying the effective date thereof. Furthermore, the residual assets and property purchased by the sub-grantee under this grant shall be transferred at the discretion of the state to an organization which is exempt from Federal income tax as an organization described in Section 501 (c)(3) of the Internal Revenue Code (1954) or to the appropriate federal, state or local government for exclusively public purposes. In such event, the state shall require the sub-grantee to ensure that adequate arrangements have been made for the transfer of all property and finished or unfinished documents, data, studies, and reports purchased by the grantee under this grant. The sub-grantee may be entitled to compensation for any unreimbursed expenses reasonably and necessarily incurred in satisfactory performance of the grant.

Notwithstanding the above, the sub-grantee shall not be relieved of liability to the state for damages sustained by the state by virtue of any reimbursement to the sub-grantee for the purpose of set-off until such time as the exact amount of damages due the state is determined.

**V.7 Health and Safety**

Health and Safety costs are recorded and tracked separately in the weatherization database. The Cost Center report accounts for all health and safety expenditures. Health and Safety expenditures are also reported on the sub-grantee's monthly financial status report.

The maximum amount of DOE Health and Safety money that can be spent on a dwelling is \$1,500.

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For specifics on allowable Health and Safety measures, see the attached Health and Safety Plan.

**V.8 Program Management**

**V.8.1 Overview and Organization**

The South Carolina Weatherization Assistance Program is administered by the South Carolina Department of Administration, Office of Economic Opportunity in Columbia, South Carolina. Created by the Community Economic Opportunity Act of 1983, the Office of Economic Opportunity (OEO) is the state's administering agency for the Community Services Block Grant, Low-Income Home Energy Assistance Program, Weatherization Assistance Program, and Emergency Solutions Grant. OEO works in partnership with community action agencies and other non-profit agencies to administer and distribute funds for local initiatives designed to appreciably impact the causes of poverty.

OEO utilizes eight (8) sub-grantees to administer the Weatherization Assistance Program for all forty-six (46) counties in South Carolina.

The OEO staff responsible for the oversight of the Weatherization Assistance Program in South Carolina are James Miller, OEO Director; Kimberly Cosare, Executive Fiscal Administrator; Patricia Morrison, Attorney; Matthew Melton, Weatherization Assistance Program Manager; Savannah Brock, Weatherization Assistance Program Coordinator; Matthew Dennis, Weatherization Assistance Program Coordinator; and Eric Anderson, Weatherization Assistance Program Quality Control Inspector.

The primary point of contact for South Carolina's WAP is Matthew Melton. The weatherization community action agencies and OEO utilize accredited IREC training centers. Financial monitoring is performed for all 8 Weatherization sub-grantees.

**V.8.2 Administrative Expenditure Limits**

The grantee (OEO) can take up to 7.5% of the total DOE 2024 allocation for administration. Sub-grantees who are allocated more than \$350,000 in 2024 DOE funds are allowed to spend up to 7.5% of their total allocation on administrative expenses. Sub-grantees who are allocated less than \$350,000 in 2024 DOE funds are allowed to spend up to 12.5% of their total allocation on administrative expenses.

**V.8.3 Monitoring Activities**

See attached Monitoring Plan.

**V.8.4 Training and Technical Assistance Approach and Activities**

See attached Training and Technical Assistance Plan.

Percent of overall trainings

Comprehensive Trainings: 75.0

Specific Trainings: 25.0

Breakdown of T&TA training budget

Percent of budget allocated to Auditor/QCI trainings: 50.0

Percent of budget allocated to Crew/Installer trainings: 25.0

Percent of budget allocated to Management/Financial trainings: 25.0

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**V.9 Energy Crisis and Disaster Plan**

**Purpose**

To provide guidance on allowable activities using Department of Energy (DOE) Weatherization Assistance Program (WAP) resources for low income individuals and families in the event of disasters as declared by the President of the United States or the Governor of the State of South Carolina.

**Policy**

The use of DOE WAP funds is limited to eligible weatherization activities and the purchase and delivery of weatherization materials. Sub-grantees are required to consult with OEO before engaging in any disaster activities. DOE WAP funds may be used to re-weatherize eligible dwellings damaged by a disaster as declared at the state and/or the federal level.

Allowable expenditures under WAP include:

1. The cost of incidental repairs to an eligible dwelling unit if such repairs are necessary to make the installation of weatherization materials effective.
2. The cost of eliminating health and safety hazards, elimination of which is necessary before the installation of weatherization materials. To the extent that the services are in support of eligible weatherization (or permissible re-weatherization) work, such expenditure would be allowable. For example, debris removal at a dwelling unit so that the unit can be weatherized would be an allowable cost. Debris removal from a dwelling unit that is not to be weatherized would not be an allowable cost. As such, using DOE funds to pay for weatherization personnel to perform relief work in the community as a result of a disaster is not allowable.

Weatherization personnel can be paid from DOE funds to perform functions related to protecting the DOE investment. Such activities include:

- Securing weatherization materials, tools,
- Securing equipment,
- Securing weatherization vehicles,
- Securing protection of local agency weatherization files, records, and the like during the initial phase of the disaster response.

Sub-grantees may use weatherization vehicles and/or equipment to help assist in disaster relief provided the WAP is reimbursed according to the DOE Financial Assistance Regulations 10 CFR Part 600.

The use of DOE funds for disaster related hazards is limited to the following:

- The total allowance for disaster related hazards is limited to the Average Cost Per Unit (ACPU) for PY 2024 = \$8,497.
- The total allowance for incidental repairs in support of installation of weatherization materials is limited to the DOE Incidental Repair maximum previously defined in Section V.5.1 = \$500.
- The total allowance for health and safety costs is limited to the DOE maximum as defined in the Health and Safety Plan = \$1,500.
- To the extent that the services are in support of eligible weatherization (or permissible re-weatherization) work, such expenditure would be allowable.

**Reprioritization of Weatherization requests coming from the disaster area**

For reprioritization of weatherization requests coming from the disaster area, WAP rules require that priority be given to identifying and providing weatherization assistance to elderly persons, persons with disabilities, families with children, high residential energy users, and households with high energy burdens (10 CFR 440.16(b)). However, it would be permissible to consider households located in the disaster area a priority as long as the households are eligible and meet one of the priorities established in regulation and are free and clear of any insurance claim or other form of compensation resulting from damage incurred from the disaster.

## South Carolina Monitoring Plan

South Carolina Office of Economic Opportunity (OEO) monitoring staff will conduct comprehensive monitoring of the Weatherization Assistance Program (WAP) for each subgrantee at least once a year, provide a written report to the subgrantee, and maintain a file related to the monitoring. This file will be accessible by DOE during its monitoring visits.

### Comprehensive Monitoring

SC OEO Monitoring (includes Programmatic, Technical, and Financial).

**Programmatic Monitoring** involves a review of:

- Client file (all paperwork filled out and in file?)
- Client eligibility (income and proper priority given based on client status?)
- Adherence to WAP federal regulations, Weatherization Program Notices (WPN), and OEO Policies and Procedures
- Production quotas (is the subgrantee on track to meet DOE production goals?)
- Deferral tracking (are dwellings deferred for legitimate reasons?)
- Contractor information (contracts, insurance, SAMs)

### Technical Monitoring

- Energy Audits (was the dwelling properly modelled?)
- Work Orders (what measures were installed?)
- Health & Safety (did the work adhere to the Health and Safety Plan?)
- Field Work (were measures properly installed according to the SWS?)
- Photographic verification (is each state of the dwelling – pre, in-progress, and post sufficiently documented?)
- Staff or entity performing the monitoring for subgrantee (did the dwelling receive a quality control inspection from the subgrantee?)

### Financial Monitoring

- Vehicles and Equipment
- Procurement (are federal and state policies followed?)
- Invoicing (are all expenses accounted for?)
- Records Retention
- Verification that an inspection by a certified Quality Control Inspector (QCI) was made prior to payment being made to a contractor or subcontractor

OEO will monitor (at least) 10 percent of the completed WAP units and accompanying client files for each subgrantee until the subgrantee has personnel in place to conduct an independent Energy Audit and Quality Control Inspection for each dwelling. In these instances, OEO will monitor (at least) 5% of the completed units.

All subgrantees have at least one certified Quality Control Inspector on staff to review weatherization measures that are installed in each dwelling. All eight subgrantees utilize contractors to install these measures ensuring separation between the individual(s) performing the work and conducting the

Quality Control Inspection. One subgrantee utilizes crews and subcontractors to install weatherization measures but does not include the Quality Control Inspector on the weatherization crew. This ensures the Quality Control Inspector is not reviewing their own work.

Six of eight subgrantees have multiple Quality Control Inspectors on staff or at least one Quality Control Inspector and a separate Energy Auditor. This ensures the Energy Audit and Quality Control Inspection are performed by different individuals. The subgrantees that do not have multiple Quality Control Inspectors or separate Energy Auditors are encouraged by OEO to contract out either the Energy Audit or Quality Control Inspection to ensure multiple certified individuals are reviewing the modeling inputs and outputs. If monitoring visits reveal unsatisfactory results for these subgrantees, OEO reserves the right to require them to contract these services out.

During monitoring visits, if significant deficiencies are discovered, such as health and safety violations, poor quality installation of materials, or major measures missed, OEO will require the subgrantee to take appropriate corrective action to resolve the outstanding issues within 30 days. OEO will conduct a follow-up monitoring visit and will inspect additional units until it can be assured that all deficiencies are resolved. Units in progress will be reviewed but not counted as a part of monitoring. In-progress monitoring will include:

- A review of the energy audit to ensure the dwelling was modeled appropriately
- A review of completed measures to ensure they satisfy the Standard Work Specifications (SWS) requirements
- Ensuring safe work practices are followed, such as lead safe weatherization protocols and OSHA compliance
- Other factors that are relevant to onsite work.

Within 30 days of the completion of the monitoring visit, a report of the programmatic/technical/fiscal monitoring results will be submitted to the executive director. A copy of the report will also be submitted to the agency's board chairperson. Should the agency be required to submit a response to the corrective action plan; the response is to be received by OEO within 30 days from the date of the report.

### **Monitoring Process**

OEO notifies the subgrantee of upcoming monitoring in writing. The notification includes a copy of the South Carolina Monitoring Instrument. The monitoring instrument is to be completed by the subgrantee and returned to OEO at least ten days before monitoring begins. The monitoring instrument identifies the number of dwellings OEO is required to visit and inspect to satisfy DOE requirements. Questions regarding the South Carolina Monitoring Instrument are encouraged during this period. This helps the monitors gain insight on the Training and Technical Assistance needs the agency has prior to the monitoring. Supporting documents related to the South Carolina Monitoring Instrument are provided by the subgrantee (contracts, licensing information, SAMs searches, wdz files, etc.).

The subgrantee works with clients they have served in the current Program Year to schedule an in-person visit by OEO. Prior to the in-person visit, OEO will review the client files in DBA FACSPRO (forms, pictures, audit information, contractor invoices, etc.) and the wdz files to understand what measures

were installed and identify any questions they may have for the subgrantee. This preliminary review will also include a programmatic audit to ensure the subgrantee complied with the policies and procedures outlined in the South Carolina WAP Policies and Procedures Manual. It will also include a financial audit to ensure DOE money was spent properly (individual and total measures within the proper savings to investment ratio, limits on funding not exceeded, invoices match amounts paid, etc.).

During the in-person visit, OEO will inspect the work performed by the subgrantee and contractors to ensure the measures are installed according to the SWS and the South Carolina Weatherization Field Guide. OEO will also interview the client to learn about their experience with the weatherization assistance program, inquire about differences in their energy bills after weatherization services, and address any concerns they have with the work done to their dwelling.

During the inspection, various tests are conducted based on the installed measures. These include blower door tests to determine if air sealing targets were met as identified in the energy audit, pressure pan tests, flow hood tests, combustion tests, and others as necessary. After the inspection and client interview, OEO will debrief with the subgrantee and offer a preliminary assessment of the work. OEO will conduct an exit conference with the subgrantee within a week from the inspection addressing their findings (technical or programmatic errors, missed opportunities, or points of emphasis), outlining any necessary next steps (call backs to fix issues), and identifying areas where additional training or technical assistance are needed.

#### **SC OEO Weatherization Staff**

- Matthew Melton, Senior Manager for Weatherization, 70.745 percent of salary from T&TA, 29.255 percent of salary is from WAP Admin
- Eric Anderson, WAP Technical Monitor, 100 percent of salary from WAP T&TA
- Matthew Dennis, WAP Coordinator, 100 percent of salary from WAP BIL Admin
- Savannah Brock, WAP Coordinator, 50 percent of salary from WAP BIL Admin (50 percent of salary from other grants and none from DOE annual WAP grant – position spends 50 percent of time assisting with administrative functions related to weatherization)

Eric Anderson will conduct the technical monitoring. OEO will also contract a portion of the quality control inspections to Apple Energy Group. Matthew Melton, Matthew Dennis, and Savannah Brock will perform the programmatic monitoring. OEO fiscal staff will conduct the fiscal monitoring.

#### **SC OEO Fiscal Monitoring Staff – all paid with WAP Admin funds**

- Fiscal Executive Administrator
- Auditor V
- Auditor IV
- Fiscal Auditor II

Scott and Company (CPA) contractor will be responsible for the fiscal monitoring of four subgrantees in PY 2024. The subgrantees that will be monitored by Scott and Company CPA are Aiken-Barnwell Counties Community Action Agency, Carolina Community Actions, Chesterfield-Marlboro Economic



Opportunity Council, and Waccamaw Economic Opportunity Council. Their findings will be included in the monitoring report.

### **Corrective Action and Suspension of Funding**

In administering this section, the Grantee will comply with 2 C.F.R. §§ 200.205 - 207, and §§200.338-75.341. The Grantee must evaluate the risks posed by the Subgrantee. If Grantee determines Subgrantee poses a risk, Grantee may impose additional specific conditions that correspond to the degree of risk assessed.

A. Special conditions and/or restrictions may be imposed when the Grantee determines that the Subgrantee:

1. Is not financially stable;
2. Has a management system and ability that does not meet the management standards set forth by the Grantee;
3. Has a documented history of unsatisfactory performance;
4. Has not complied with the general or specific terms, conditions, covenants, and stipulations of previous grant awards; OR
5. Is otherwise not responsible.

B. Special conditions and/or restrictions Grantee may impose include, but are not limited to the following:

1. Payment to the Subgrantee on a reimbursement basis;
2. Withholding authority to proceed to the next phase until receipt of evidence of acceptable performance within a given funding period;
3. Requiring additional detailed financial reports and/or data;
4. Additional project monitoring and interim audits;
5. Requiring the Subgrantee to obtain technical and/or management assistance;
6. Establishment of additional prior approvals;
7. Establishment of additional constraints as necessary and appropriate in the circumstances;

### **AND/OR**

8. Require Board acknowledgement of agency's status.

C. If Grantee decides to impose such special conditions and/or restrictions, Grantee will notify the Subgrantee as early as possible, of the following:

1. The nature of and reason for the special conditions and/or restrictions;
2. The corrective actions which must be approved Grantee and completed by the Subgrantee prior to the removal of the special conditions and/or restrictions;
3. The time allowed for completing the corrective actions, if applicable;
4. The method of appeal for reconsideration of the imposed conditions/restrictions; and

5. The training and technical assistance Grantee is offering to the Subgrantee, if appropriate, to help correct the deficiency. If training and technical assistance are not appropriate, Grantee will include an explanation detailing the reason(s).

D. Grantee will remove any special condition and/or restriction once the conditions prompting them have been corrected.

### **Remedies for Noncompliance**

If Subgrantee fails to comply with Federal and/or State statutes, regulations or the terms and conditions of a Federal Award, Grantee may impose additional conditions, as described in §VIII of this grant agreement. If Grantee determines that noncompliance cannot be remedied by imposing additional conditions, Grantee may take one or more of the following actions, as appropriate in the circumstances:

- A. Temporarily withhold cash payments pending correction of the deficiency by the Subgrantee;
- B. Disallow all or part of the cost of the activity or action not in compliance;
- C. Wholly or partly suspend or terminate the grant agreement;
- D. Initiate suspension, debarment, or termination of the grant agreement;
- E. Withhold further grant agreement funds for the project or program; and/or
- F. Take other remedies that may be legally available.

### **Administrative Enforcement**

The enforcement remedies identified in the agreement do not preclude the Subgrantee from being subject to "Debarment and Suspension" as prescribed by the Grantee. When a Subgrantee fails to comply with the terms of this Agreement, as outlined in Section IX (Corrective Action and Suspension of Funding) and/or grant requirements/reports are not submitted within the required time frame, nor completed in accordance with the generally accepted principles, nor consistent with the approved budget, Work Plan or Grant Agreement; a temporary suspension of funding for enforcement purposes may be instituted, but shall not constitute a statutory termination or reduction of funding.

#### **A. Effects of Suspension**

Costs incurred by the Subgrantee during a suspension or after termination of the Grant Agreement are not allowable unless the Grantee expressly authorizes such in the Notice of Suspension or Termination. Other Subgrantee costs during suspension or termination, which are necessary and not reasonably avoidable, are allowable if:

1. The costs result from obligations which were properly incurred by the Subgrantee before the effective date of the suspension or termination are non-cancelable; and
2. The costs would be allowable if the Grant was not suspended or expired normally at the end of the funding period in which the termination takes effect and the Subgrantee has written permission from the Grantee to incur such costs.

#### **B. Relationship to Debarment and Suspension**

If this Grant exceeds \$25,000 or if the Subgrantee has critical influence on or substantive control over the transaction completion of the Grant, completion of the Debarment Certification. The Subgrantee is

responsible for completing the Debarment Certification, monitoring the submission, and maintaining the official document.

### **Termination**

Termination is defined as the permanent withdrawal of funding by the state administering authority of an eligible entity's authority to obligate previously awarded funds before that authority would otherwise expire, or the refusal of the state to continue funding to the eligible entity. A temporary suspension of funding for administrative enforcement purposes shall not constitute a statutory termination or reduction of funding.

Termination of this Grant Agreement may be initiated by the Grantee, the Subgrantee, or by mutual agreement of both parties as prescribed herein. The following shall apply to the termination of this Grant:

#### **A. Termination for Lack of Funds**

The parties hereto covenant and agree that their liabilities and responsibilities, one to another, shall be contingent upon the availability of funds, Federal or State, for the funding of DOE WAP activities. This Grant shall be terminated if such funding ceases to be available. The Grantee shall have the sole authority for determining the lack of availability of such funds. The Grantee shall immediately notify the Subgrantee of any cutback in funds of which it becomes aware.

#### **B. Termination for Breach of Grant**

This Grant may be suspended or terminated by the Grantee at any time within the Grant period whenever it is determined by the Grantee that the Subgrantee has breached or otherwise failed to comply with its obligations.

#### **C. Termination for Breach of Previous Contracts and Grants or Non-Payment of Previous Audit Disallowances**

This Grant may be suspended or terminated by the Grantee at any time within the Grant period if the Subgrantee has failed to make payment in full to the Grantee for audit disallowances pursuant to any previous Contract or Grant Agreement between the parties or the Subgrantee has failed to comply with the maintenance and inspection of records requirements of any previous Contract or Grant between the parties.

#### **D. Termination by Subgrantee**

The Subgrantee may terminate this Grant by giving the Grantee 30 day's written notice of intent to do so. Expenditures legitimately incurred by the Subgrantee prior to the date of termination of this Grant will be permitted providing they are in accordance with provisions of this Grant.

#### **E. Termination for Convenience**

The Grantee and Subgrantee may mutually agree to terminate the Grant in whole or in part. In which case, the two parties shall agree upon the termination conditions, the effective date and in the case of partial termination, the portion to be terminated.

#### F. Termination for Insolvency

This Grant is subject to immediate termination by the Grantee upon the Subgrantee's insolvency, including the filing of proceedings in bankruptcy.

#### G. Termination by Department of Energy (DOE)

This grant is subject to immediate termination by Grantee upon notice that Subgrantee has lost or been denied funding from DOE.

#### H. Notice of Termination

In the event of Grant termination, the party terminating the Grant shall give notice of such termination in writing to the other party. Notice of Termination shall be sent by certified mail, return receipt requested, and shall be effective 30 days after the date of the receipt, unless otherwise provided by law; provided however, if terminated pursuant to paragraph A, F, or G above said termination shall be effective upon receipt of such notice.

#### I. Process for Termination

If Grantee believes cause for funding termination exists, the following steps shall be followed:

1. If Subgrantee fails to correct any and all deficiencies identified during a corrective action plan or if based on the seriousness of any of the deficiencies, the Grantee determines termination is appropriate, a certified letter will be sent from the Grantee's director to the Subgrantee's board chairperson advising him/her of Grantee's recommendation to terminate the grant, along with the reasons for this recommendation. Within fifteen (15) days of receipt of this recommendation, Subgrantee may request a hearing in writing to appeal the recommendation.
2. If Subgrantee appeals Grantee's recommendation, the Department of Administration's chief legal counsel will select a Hearings Officer to conduct the hearing within thirty (30) days of receipt of the letter of appeal, utilizing the informal disposition procedures outlined in S.C. Code §§ 1-23-310 to 1-23-400 of the State Administrative Procedures Act. All proceedings will be recorded.
3. All decisions made by the Hearings Officer are final.
4. In the event funding termination occurs, Grantee shall either extend the geographic service area of an eligible entity or submit a Request for Proposal and bid for a new eligible entity. This will be done, as necessary, to provide services to the economically vulnerable in that service area and shall be administered in accordance with existing Federal and State legislation.

# TRAINING AND TECHNICAL ASSISTANCE (T&TA) PLAN

## 1.0 – GENERAL INFORMATION

COMMENTS THAT DO NOT GENERALLY FIT INTO THE AVAILABLE TABLES BELOW

Training and Technical Assistance (T&TA) activities are intended to maintain or increase the efficiency, quality, and effectiveness of the Weatherization Assistance Program at all levels. Such activities will be designed to maximize energy savings, minimize production costs, improve program management and operational efficiencies, improve crew/contractor work quality, increase client satisfaction, and to reduce the potential for waste, fraud, abuse, and mismanagement.

T&TA funding will be available for Grantee and Subgrantee use. Funds may be used to pay salary, travel, and operational and contractual costs for monitoring, obtaining certifications, maintaining certifications, training, training support, and providing or receiving programmatic and technical assistance. T&TA funds may also be used to train contractors participating in the program provided a retention agreement is obtained. See attached memo and policy for reimbursing contractors with T&TA funds.

## 2.0 – OVERALL T&TA PLAN

YOUR OVERALL T&TA PLAN MUST INCORPORATE SUGGESTIONS AND FEEDBACK FROM THE FOLLOWING ELEMENTS.

### FEEDBACK FROM INTERNAL AND EXTERNAL REVIEWS, EXAMPLES INCLUDE:

- FEEDBACK FROM DEPARTMENT OF ENERGY (DOE) PROJECT OFFICER (PO) MONITORING VISITS
- INTERNAL STATE AUDITS
- GRANTEE MONITORING OF THE SUBGRANTEES
- OFFICE OF INSPECTOR GENERAL (OIG) REPORTS
- AMERICAN CUSTOMER SATISFACTION INDEX FEEDBACK, AND
- OTHER. EXAMPLES INCLUDE:
  - TRAINING FEEDBACK
  - TRAINING RETENTION ACTIVITIES

OEO is using feedback from the most recent DOE monitoring visit which occurred in 2019 in conjunction with annual subgrantee monitoring to assess training needs. During the annual monitoring, OEO focuses on errors identified in the DOE monitoring report to ensure they are not repeated.

### EXISTING OR PLANNED ACCREDITED TRAINING CENTER PARTNERSHIP OR WORKING RELATIONSHIP.

OEO has a working relationship with CHP Energy Solutions in Christiansburg, Virginia. Many OEO and network staff receive their Crew Leader, Energy Auditor, Quality Control Inspector, and Retrofit Installer Technician certifications and recertifications at this site. OEO and the network also have a working relationship with The American Institute of Building Science (AIOBS). AIOBS helps staff prepare for exams through intensive one-week sessions. AIOBS travels to South Carolina and provides training to all sub-grantees collectively so travel costs are minimized. AIOBS also mentors subgrantee QCIs and provides training at the annual mid-Fall conference hosted by the South Carolina Association of Community Action Partnerships (SCACAP). OEO has a contract with Apple Energy Group to conduct Quality Control Inspections. Apple Energy has a number of certified Quality

Control Inspectors on staff to assist OEO with the increase in mandated inspections due to the increase in production associated with the WAP BIL grant. OEO also contracts with Everblue and Saturn Resource Management for ad hoc training courses and with assistance in writing the South Carolina Field Guide.
<b>PREPARATIONS FOR FUTURE/UPCOMING PROGRAM REQUIREMENTS, EXAMPLES INCLUDE:</b>
<ul style="list-style-type: none"> <li>• <b>UPDATED STANDARD WORK SPECIFICATIONS (SWS)</b></li> <li>• <b>MIGRATION TO ONLINE WEATHERIZATION ASSISTANT</b></li> <li>• <b>INCLUSION OF SPECIFIC LANGUAGE FROM WEATHERIZATION PROGRAM NOTICES (WPN)</b></li> </ul>
OEO updated the South Carolina Field Guide to align with the new Standard Work Specifications in 2021. OEO also updates its Policies and Procedures Manual quarterly. Quarterly releases of the Policies and Procedures Manual are accompanied by a Change Control document so changes can easily be identified by the network.
<b>WHAT PROTOCOLS ARE IN PLACE WHICH ENSURE UNTRAINED STAFF ARE NOT LEFT WITHOUT SUPERVISIONS DURING FIELD OPERATIONS?</b>
<p>Subgrantees are required to have an internal process in place to ensure all required workforce credentials are obtained, tracked, and maintained. During OEO’s annual monitoring of sub-grantees, these processes are reviewed. This review includes compiling a list of all sub-grantee staff, their specific credentials, when those credentials expire, and scheduled trainings to renew those credentials.</p> <p>Subgrantees sometimes hire staff that are not certified as Energy Auditors or Quality Control Inspectors, but that do possess experience in construction with the goal of getting them certified later. During this time when they lack certifications, they shadow certified staff during assessments and inspections. These employees will not work unsupervised until they receive the required credentials.</p>
<b>PARTNERSHIPS WITH THE STATEWIDE HOME PERFORMANCE INDUSTRY ON TRAINING ISSUES; IF APPLICABLE.</b>
Not applicable.
<b>HOW DOES ANALYSIS CONDUCTED, AS DETAILED IN SECTION V.6 OF THE ANNUAL APPLICATION, INFLUENCE THE DEVELOPMENT OF T&amp;TA ACTIVITIES AND PRIORITIES?</b>
Training and technical assistance needs are determined during onsite monitoring of subgrantees. Issues that are identified during these monitorings (programmatic, technical, or production) are addressed in the monitoring report and in the exit conference between OEO and the subgrantee. Shortcomings are addressed collaboratively as OEO works together with the subgrantee to identify trainings that increase productivity.

<b>3.0 – WORKFORCE CREDENTIALS</b>
<b>DESCRIBE THE FOLLOWING ASPECTS OF YOUR T&amp;TA PLAN RELATED TO WORKFORCE CREDENTIALS.</b>
<b>FEDERALLY REQUIRED CREDENTIALS. EXAMPLES INCLUDE:</b>
<ul style="list-style-type: none"> <li>• <b>ENVIRONMENTAL PROTECTION AGENCY LEAD RENOVATION, REPAIR, AND PAINTING PROGRAM</b></li> <li>• <b>HOME ENERGY PROFESSIONALS QUALITY CONTROL INSPECTOR CERTIFICATION</b></li> </ul>
All new hires by the network must obtain Lead Safe Weatherization (LSW), EPA Renovate-Repair-Paint, and OSHA 10 certification within 6 months of hired date or by 6 months from the beginning of the program year (October 1 <sup>st</sup> ).
<b>GRANTEE/STATE REQUIRED CREDENTIALS. EXAMPLES INCLUDE:</b>
<ul style="list-style-type: none"> <li>• <b>BUILDING PERFORMANCE INSTITUTE BUILDING ANALYST</b></li> <li>• <b>GRANTEE-DEVELOPED CERTIFICATIONS</b></li> </ul>

OEO requires all weatherization field staff to hold certification as a Crew Leader, Energy Auditor, Quality Control Inspector, or Retrofit Installer Technician.
<b>SUBGRANTEE/LOCAL REQUIRED CREDENTIALS. EXAMPLES INCLUDE:</b>
<ul style="list-style-type: none"> <li>• <b>CONTRACTOR LICENSING</b></li> </ul>
In addition to the trainings outlined above, crew-based sub-grantees must obtain the necessary licensure required by the local government to conduct business and perform applicable construction work in their jurisdiction. The subgrantees that utilize contractors are responsible for ensuring those contractors hold the necessary licenses required by local governments to conduct business and perform applicable construction work in their jurisdiction. OEO reviews the credentials and licenses for contractors and crews during their annual monitoring.
<b>INDUSTRY REQUIRED CREDENTIALS. EXAMPLES INCLUDE:</b>
<ul style="list-style-type: none"> <li>• <b>EQUIPMENT/MATERIAL MANUFACTURE CERTIFICATION</b></li> <li>• <b>VENDOR CERTIFICATION</b> (E.G. EQUIPMENT/MATERIAL MANUFACTURE CERTIFICATION, VENDOR CERTIFICATION)</li> </ul>
Not applicable.
<b>PROCESS FOR MAINTAINING WORKFORCE CREDENTIALS</b>
Subgrantees are responsible for ensuring their staff are properly credentialed. As a credential is approaching the expiration date, the individual holding that certification will schedule review classes if necessary and arrange for the recertification process and testing with the testing center that oversees that credential. OEO is notified when the credential is successfully renewed.
<b>HOW CREDENTIALS ARE TRACKED</b>
Credentials are tracked in FACSPRO, the database system that also tracks other aspects related to weatherization in South Carolina (units weatherized, client files, cost center, etc.). OEO also manually tracks contractor credentials and certifications (licensure, bond sureties, lead certification, SAMs exclusions, liability, worker's compensation insurance, and weatherization contracts) during the monitoring of each subgrantee.

## 4.0 – TRAINING

GRANTEES HAVE TWO OPTIONS TO DESCRIBE THEIR TRAINING.

- A) USE THE EMBEDDED SPREADSHEET\* TO IDENTIFY AND DESCRIBE THE TRAINING SCHEDULE FOR GRANTEE AND SUBGRANTEE STAFF. INCLUDE TECHNICAL AND NON-TECHNICAL TRAINING.
- B) OR USE THE FIELDS BELOW TO IDENTIFY AND DESCRIBE THE TRAINING SCHEDULE FOR GRANTEE AND SUBGRANTEE STAFF. INCLUDE TECHNICAL AND NON-TECHNICAL TRAINING.

GRANTEE'S ARE TO INCLUDE THE FOLLOWING IN THEIR DESCRIPTIONS REGARDLESS OF WHAT OPTION IS BEING USED TO DESCRIBE THEIR TRAINING PLAN:

- SPECIFY WHETHER ATTENDANCE IS MANDATORY, AND THE RAMIFICATIONS FOR NON-COMPLIANCE.
- SPECIFY IF THE T&TA PLAN SPANS MULTIPLE PROGRAM YEARS (PY), INDICATE WHICH TRAININGS ARE INTENDED IN THE CURRENT PY AND WHICH ARE PLANNED FOR FUTURE PYS.

\* THE EMBEDDED SPREADSHEET, IF COMPLETED AT THE END OF THE YEAR TO RECORD DELIVERED TRAINING, CAN BE USED AS DOCUMENTATION FOR THE REQUIRED ANNUAL T&TA REPORT. DOUBLE CLICK TO OPEN SPREADSHEET. ENTER INFORMATION AND CLOSE. IT WILL AUTOMATICALLY SAVE YOUR INFORMATION

**PROGRAMMATIC/ADMINISTRATION TRAINING**

- FINANCIAL (I.E. 2 CFR 200)
- MANAGEMENT (I.E. 10 CFR 440)

Fiscal and financial trainings are conducted by OEO staff during monitoring visits as issues are identified or as requested by subgrantees. OEO also conducts fiscal training in sessions at the South Carolina Association of Community Action Partnership (SCACAP) Annual Fall Conference. These trainings address topics associated with 2 CFR 200 to ensure subgrantees are complying with issues such as procurement, contractual requirements, reporting, allowable costs, and any updates to the OEO fiscal manual. Subgrantees are also required to submit monthly Financial Status Reports. OEO reviews these reports and identifies areas of concern if they exist so these can be addressed prior to monitoring visits.

Programmatic trainings are conducted by OEO staff during monitoring visits. These trainings focus on areas where the subgrantee may be deficient. Programmatic training also occurs at the SCACAP Annual Fall Conference. These trainings address issues related to CFR 400 and include topics such as file creating and maintenance (requirements for a weatherization file to pass an OEO and DOE audit), policy and procedure updates (including new Weatherization Program Notices and Memos) and navigating the FACSPRO system.

**COMPREHENSIVE TECHNICAL TRAINING ALIGNED TO THE JOB TASK ANALYSIS (IDENTIFY AT WHAT INTERVALS WORKERS WILL RECEIVE REGULAR, COMPREHENSIVE TRAINING AS REQUIRED BY WEATHERIZATION PROGRAM NOTICE (WPN) 15-4)**

- QUALITY CONTROL INSPECTOR
- ENERGY AUDITOR
- CREW LEAD
- RETROFIT INSTALLER/TECHNICIAN

OEO requires all subgrantee weatherization new hires that lack certification as a Crew Leader (CL), Retrofit Installer (RIT), Energy Auditor (EA) or Quality Control Inspector (QCI) to begin training toward one of the certifications within six months. These certifications last for three years and must be recertified through a Building Performance Institute (BPI) training center. Subgrantees are required to notify OEO when they make hires so OEO will be able to access training needs in real-time.

Subgrantees are encouraged to identify occupation-specific Job Task Analysis (JTA) weaknesses within their local agency and obtain necessary comprehensive technical training utilizing their individual awarded T&TA funds. Examples of available trainings and certifications include Healthy Home Evaluator (HHE) and Site Supervisor Certificate (SSC). Additional comprehensive technical training is handled on an ongoing and as-needed basis as identified by network request, new/updated requirements, new staff hires, results of monitoring reports, or as deemed necessary by grantee staff.

**SPECIFIC TECHNICAL TRAINING**

- TOPICS IDENTIFIED DURING MONITORING VISIT(S)
- ENERGY MODELING
- HEALTH & SAFETY. ALL H&S TOPICS IN WPN 17-7 REQUIRE SOME LEVEL OF TRAINING FOR ALL AFFECTED WORKERS, THE FREQUENCY OF THIS TRAINING IS A GRANTEE DECISION. EXAMPLES INCLUDE:
  - AIR CONDITIONING AND HEATING SYSTEMS
  - ASBESTOS
  - BIOLOGICALS AND UNSANITARY CONDITIONS
  - BUILDING STRUCTURE AND ROOFING
  - CODE COMPLIANCE
  - COMBUSTION GASES
  - ELECTRICAL



- FORMALDEHYDE, VOLATILE ORGANIC COMPOUNDS (VOCs), FLAMMABLE LIQUIDS, AND OTHER AIR POLLUTANTS
- FUEL LEAKS
- GAS RANGE/OVENS
- HAZARDOUS MATERIALS DISPOSAL
- INJURY PREVENTION OF OCCUPANTS AND WEATHERIZATION WORKERS
- LEAD BASED PAINT
- EPA’S LEAD RENOVATION, REPAIR & PAINTING PROGRAM (RRP)MOLD/MOISTURE
- PESTS
- RADON
- SAFETY DEVICES
- VENTILATION AND INDOOR AIR QUALITY
  - AMERICAN SOCIETY OF HEATING REFRIGERATION AND AIR-CONDITIONING ENGINEERS (ASHRAE)
- WINDOW REPAIR, DOOR REPAIR
- WORKER SAFETY
  - OSHA
- ADDITIONAL TOPICS AS DESCRIBED IN HEALTH & SAFETY PLAN
- CLIENT EDUCATION (TRAINING WORKERS TO CONDUCT CLIENT EDUCATION). EXAMPLES INCLUDE:
  - ENERGY SAVINGS STRATEGIES
  - PROGRAM-SPECIFIC INFORMATION. EXAMPLES INCLUDE:
    - WHAT TO EXPECT
    - ADDITIONAL RESOURCES
  - HEALTH & SAFETY ISSUES

Specific technical training will be provided on an as-needed basis. The specific need and technical expertise required will determine the training provider. Subgrantees are encouraged to utilize Saturn Resource Management (SRM) for virtual technical training. OEO has a relationship with this organization which writes and edits the South Carolina Weatherization Field Guide. SRM provides a variety of online courses (air sealing, attic insulation, blower door testing, etc.). These courses allow subgrantee staff to focus on topics that interest them and enable them to gain continuing education units (CEUs) to maintain their comprehensive certifications (energy auditor, QCI, etc.).

OEO also contracts with AIOBS to provide specific technical training based on subgrantee requests and issues identified during monitorings or raised during TAG meetings.

**CONFERENCES. EXAMPLES INCLUDE:**

- ENERGY OUTWEST
- BUILDING PERFORMANCE ASSOCIATION
- NATIONAL ASSOCIATION FOR STATE AND COMMUNITY SERVICE PROVIDERS
- COMMUNITY ACTION PARTNERSHIP

OEO plans to have at least one staff member attend the following conferences in Program Year 2024. Additional details are provided in the budget section of the Annual File.

**First Quarter (April – June)**

- SCACAP Spring Conference – TBD Spring 2024 (attendance encouraged)
- National Home Performance Conference – April 8-11, 2024 (attendance encouraged)

**Second Quarter (July – September)**

- Energy Out West – August 19-23, 2024 (attendance encouraged)
- NASCSP Annual Conference – TBD September, 2024 (attendance encouraged)

**Third Quarter (October – December)**

- SCACAP Fall Conference – TBD November 2024 (attendance encouraged)

**Fourth Quarter (January – March)**

- TBD

**OTHER, PLEASE SPECIFY:**

OEO has encouraged the network to utilize Saturn Resource Management’s e-learning classes to earn Continuing Education Units (CEUs) in courses related to their role with the subgrantees. These e-learning courses are classified as specific technical trainings and include topics such as Air Pressure Basics, Blower Door Testing, and Moisture Theory. OEO has also authorized subgrantees to use the additional T&TA funds to train contractors they utilize for weatherization services. These funds can be used to train contractors that are new to the WAP or to enhance the skills of contractors that have been found to be deficient in previous monitorings.

OEO administrative staff (Savannah Brock, Matthew Dennis, and Matthew Melton) will take an online course provided by Everblue Training regarding Building Science Principles to gain a better understanding of the technical portion of the program. OEO has encouraged administrative staff at the subgrantee level to take the course as well.

As of the beginning of the 2024 Program Year, OEO has scheduled \_\_\_ trainings (see attached T&TA Schedule Spreadsheet).

**5.0 – TECHNICAL ASSISTANCE**

DESCRIBE THE TECHNICAL ASSISTANCE ACTIVITIES INCLUDED IN THE T&TA BUDGET CATEGORY.

**PROGRAMMATIC/ADMINISTRATION SUPPORT**

OEO provides programmatic and administrative technical assistance during annual monitoring. OEO also provides ad hoc technical assistance throughout the program year. OEO has developed a positive rapport with the network and is available to answer questions or concerns via email, telephone, or virtual meetings (Microsoft Teams, Zoom, etc.). If important policy changes or clarifications are necessary, OEO will disseminate memos or updates to the Policies and Procedures Manual to the network. Network staff are encouraged to notify OEO when questions arise so they can be addressed immediately.

**TECHNICAL SUPPORT**

OEO and the network convene monthly for virtual Technical Advisory Group (TAG) meetings. The TAG is composed of representatives (weatherization directors, Quality Control Inspectors, Energy Auditors) from each of the eight subgrantees and a representative from OEO. The TAG discusses situations they have encountered during weatherization activities over the previous month. They seek OEO’s guidance on any outstanding questions and OEO takes any unresolved issues to DOE for further clarification. If subgrantee monitoring has occurred between TAG meetings, OEO will identify issues they have noticed and discuss with the TAG.

**HEALTH & SAFETY SUPPORT ACTIVITIES**

Health and safety is discussed during monthly TAG meetings and unit inspections. Subgrantees are encouraged to keep OEO apprised of any health and safety questions that arise during weatherization work so they can be addressed before the dwelling is completed.

**MONITORING**

**WHAT PERCENTAGE OF T&TA FUNDING IS ALLOCATED TO MONITORING? (IF DEFINED IN SECTION B OF THE BUDGET DETAILS WITHIN THE ANNUAL APPLICATION, INCLUDE THAT WITHIN YOUR DESCRIPTION BELOW.)**

OEO does not identify a specific percentage of T&TA funding that is allocated to monitoring.

**OTHER, PLEASE SPECIFY**

Not applicable.

## 6.0 CLIENT EDUCATION

DESCRIBE WHAT CURRENT AND PLANNED CLIENT EDUCATION MATERIALS AND/OR ACTIVITIES ARE INCLUDED IN THE T&TA BUDGET CATEGORY. ONLY THOSE PAID FOR WITH T&TA FUNDS NEED TO BE MENTIONED.

NOTE: THIS DOES NOT INCLUDE TRAINING WORKERS TO DELIVER CLIENT EDUCATION. THIS SHOULD BE DESCRIBED IN THE TRAINING SECTION, ABOVE.

CLIENT EDUCATION ACTIVITIES PRIOR TO, DURING AND AFTER WEATHERIZATION WHICH ADDRESS THE WEATHERIZATION PROCESS AND ENERGY SAVINGS DETAILS

Client education is vital to the Weatherization Assistance Program. When clients understand the measures to be installed on their dwellings and are given instructions on how to use their new appliances (programmable thermostats, refrigerators, etc.), the program can realize additional energy savings. In addition, client education helps ensure reasonable expectations are set and clients are satisfied with the weatherization services. Befitting its importance, client education is provided by subgrantees at numerous points during the weatherization process. This occurs at intake when clients are given information about radon, lead-safe renovation, and mold and moisture. It also occurs at the energy audit when clients are given information regarding the services that will be performed. It occurs when measures are being installed as contractors and network staff answer client questions. Finally, it occurs post-weatherization when clients are given instructions and warranty information for any installed appliances (refrigerators, HVAC units, thermostats, ASHRAE fans, etc.). Clients are also given the opportunity to provide feedback to the sub-grantees after weatherization services are completed using Form 400 (Client Review). Subgrantees address concerns the client may have with their work at this time. OEO also interviews clients when they monitor subgrantees to determine their satisfaction with the weatherization process and their experience with the subgrantee staff and the contractors that performed the weatherization work. Any concerns or issues are detailed in the annual monitoring reports.

### CLIENT EDUCATION ACTIVITIES REGARDING H&S ISSUES AS INDICATED IN WPN 17-7

- AIR CONDITIONING AND HEATING SYSTEMS
- ASBESTOS
- BIOLOGICALS AND UNSANITARY CONDITIONS
- BUILDING STRUCTURE AND ROOFING
- CODE COMPLIANCE
- COMBUSTION GASES
- ELECTRICAL
- FORMALDEHYDE, VOLATILE ORGANIC COMPOUNDS (VOCs), FLAMMABLE LIQUIDS, AND OTHER AIR POLLUTANTS
- FUEL LEAKS
- GAS RANGE/OVENS
- HAZARDOUS MATERIALS DISPOSAL
- INJURY PREVENTION OF OCCUPANTS AND WEATHERIZATION WORKERS
- LEAD BASED PAINT
- EPA'S LEAD RENOVATION, REPAIR & PAINTING PROGRAM (RRP)MOLD/MOISTURE
- PESTS
- RADON
- SAFETY DEVICES
- VENTILATION AND INDOOR AIR QUALITY
  - AMERICAN SOCIETY OF HEATING REFRIGERATION AND AIR-CONDITIONING ENGINEERS (ASHRAE)
- WINDOW REPAIR, DOOR REPAIR
- WORKER SAFETY
  - OSHA

○ ADDITIONAL TOPICS AS DESCRIBED IN HEALTH & SAFETY PLAN

Health and safety client education is provided at each stage of the weatherization process (intake, energy audit, during the install, and post-weatherization). The following health and safety topics may be covered:

- Lead Based Paint
- Suspected asbestos containing materials
- Radon
- Unvented space heaters
- Carbon monoxide
- Mold and mildew
- Plumbing and gas leaks
- Pests
- Existing air quality issues
- Electrical hazards
- ASHRAE fan use