ISSUANCES AFFECTED:

REFERENCES

- The CSBG Act, P.L. 97-35 of 1981, as amended by the Coats Human Services Reauthorization Act of 1998.
- CSPM Item 402.1 – Program Accounts & Cost Categories for CSBG

RESCISSIONS CSPM Item 302, effective 7/22/96

PURPOSE:

To provide guidelines and instructions to CAAs for submitting requests for Community Services Block Grant (CSBG) Discretionary funds.

BACKGROUND:

CSBG Discretionary funds are available to CAAs to fund innovative projects that are designed to eliminate poverty, promote self-sufficiency and promote community revitalization in the CAA's service area. FIA is particularly interested in projects that use CSBG funds:

- As seed money to bring in other funds, or
- For pilot projects that have the potential of being copied by other agencies.

POLICY:

Eligibility

Eligibility for direct services to clients, or for recipients benefiting from the project activities, must be based on 125 percent of the poverty income guidelines published by the U.S. Department of Health and Human Services (see CSPM Item 502 for current guidelines). This applies to that portion of the project being funded with CSBG funds. If, for example, a project is 60 percent funded by CSBG, at least 60 percent of the services or benefits must go to persons at or below 125 percent of poverty.

Maximum Funding

At any given time, an agency may have a maximum of $50,000 in outstanding CSBG Discretionary funds. This may be for a single project or multiple projects. If, for example, an agency has an existing $30,000 discretionary grant with $15,000 in unspent funds, the Agency may apply for a maximum of $35,000 in additional CSBG Discretionary funds.

Application

To apply for CSBG Discretionary funds, a CAA must submit a one or two-page concept paper. The concept paper should include the following:

- Need being addressed.
- Activities planned and the main objectives of the project.
- Proposed project period.
- Names of any collaborating agencies.
- Proposed budget with a brief description of the amount and type of costs to be included in each line item.

Concept papers should be sent to the FIA Director of Family and Community Services with a copy to the Agency's grant manager, at the following address:

Family Independence Agency
CSBG/WEATHERIZATION
Grand Tower - Suite 1314
P.O. Box 30037
Lansing, Michigan 48909

Requests will be reviewed by FIA and the agency will receive written notification of the approval or disapproval of the request. Approval will be dependent upon the project meeting the intended use of these funds, as well as funding availability.

For approved requests, the FIA grant manager will contact the agency to provide instructions for the development of the narrative and budget for the CSBG Discretionary contract. Agencies should plan for a minimum of 60 days between submission of the application and the starting date of the contract.

Unallowable Activities

Unallowable activities include:

- The purchase or improvement of land, or the purchase, construction, or permanent improvement (other than low-cost residential weatherization, or other energy-related home repairs) of any building or other facility.
- Any partisan or nonpartisan political activity or any political activity associated with a candidate, or contending faction or group, in an election for public or party office.
- Any activity to provide voters or prospective voters with transportation to the polls or similar assistance in connection with any such election.
- Any voter registration activity.
- The purchase of equipment having a unit cost of $5,000 or more.

CSBG DISCRETIONARY FUNDS

APPLICATION GUIDELINES

OVERVIEW

Community Services Block Grant (CSBG) Discretionary Funds are available to fund project activities previously described in an agency=s concept paper and recommended for funding by the Family Independence Agency (FIA). Eligibility for direct services to clients, or for recipients benefiting from the funded activity, is based on 125 percent of the most recent poverty income guidelines published by the U.S. Department of Health and Human Services.

ALLOWABLE ACTIVITIES

Allowable activities include those that demonstrate a measurable impact on causes of poverty in the agency=s service community. **Only the activities/projects previously described in the agency=s concept paper will be funded**. Activities must fall within 1 or more of the following CSBG designated program areas: Employment, Education, Income Management, Housing, Emergency Services, Nutrition, Linkages with Other Programs, Self-Sufficiency, and Health.

UNALLOWABLE ACTIVITIES

Unallowable activities include:

- Any activities to provide voters and prospective voters with transportation to the polls or to provide any similar assistance in connection with an election or any voter registration activity;
- The purchase or improvement of land;
- The purchase, construction, or permanent improvement of any building or other facility; or
- The purchase of equipment, i.e., tangible personal property having a useful life of three or more years and a unit cost of $5,000 or more.

APPLICATION INSTRUCTIONS

The application for funds must include the following items, in order. A Contract between FIA and the CAA will be developed from this information.

1. **TRANSMITTAL LETTER** from the CAA Executive Director indicating that the **board has reviewed and approved the application.**

2. **AGENCY IDENTIFICATION Sheet** (**Attachment I**)

3. **PLAN SYNOPSIS** (**Attachment II**)

Provide a summary of key information about the project. **Note**: A resubmittal of the concept paper will not fulfill the requirement of the plan synopsis. Include:

- The need that is being addressed.
- A description of the activity and its main objectives.
- The project period.
- Service area, service sites, any special characteristics of the target population.
- Other collaborating agencies.

4. **WORK STATEMENT** (**Attachment III**)

A. Program Description

- Identify all proposed activities and services that will be supported in whole or in part by this application.
- Include the method of delivery and the anticipated results for each activity or service.
- Also describe any other activities conducted by your agency that **are not supported by this application** but are specifically connected as part of the overall scope of the project.

B. Coordination and Collaboration

Describe any planned coordination and collaboration activities expected to occur that are essential for a successful project. Indicate what other agencies or groups that will be involved and how they will participate.

5. **ROMA PLAN(S)** (**Attachment IV**)

Submit a minimum of one performance Target Outline appropriate for submitted project.

6. **CONTRACT BUDGET** (**Attachment V**)

See the attached budget forms and instructions.

APPLICATION SUBMISSION

Submit four copies of the application, with a signed transmittal letter to:

Family Independence Agency
CSBG/WX
Grand Tower - Suite 1314
P.O. Box 30037
Lansing, MI 48909

ATTACHMENT I

AGENCY IDENTIFICATION

APPLICANT AGENCY _____

AGENCY ADDRESS _____

_____

TELEPHONE NO. _____

FEDERAL I.D. No. _____

PROJECT TITLE _____

GEOGRAPHIC AREA TO BE SERVED _____

_____

NAME & ADDRESS OF ANY SUBCONTRACTING AGENCIES

_____

_____

_____

_____

NAME & TITLE OF PERSON AUTHORIZED TO SIGN THE CONTRACT

_____

Name Title

APPLICATION CONTACT PERSON
(For questions and discussion concerning application)

_____

Name Title Telephone

CHIEF FISCAL OFFICER

_____

Name Title Telephone

ATTACHMENT II

PLAN SYNOPSIS

Provide a summary of key information about the project. (See page 2 of the Application Guidelines)

WORK STATEMENT

A. Project Description (See page 2 of the Application Guidelines.)

WORK STATEMENT

B. Coordination and Collaboration (See page 2 of the Application Guidelines.)

ATTACHMENT IV

Agency Name: **Goal ___ (page __ of __)**

ROMA – Performance Target Outline (Agency Goal)

NATIONAL GOAL____: _____

(Please review the definitions in the instructions before completing this form.)

1. (State) Investor Target:

2. (CAA) Target Area:

3. Performance Target:

4. Performance Target Period (Mo./Year thru Mo./Year):

5. Target Population:

6. a) Service Type of Unit: b) Service Category:
7. Milestones: Identify the customer/client milestones and how many customers will reach each milestone and when.

Milestone No.	Customer Milestones	Customers in Service/ Milestone	1st Qtr Oct-Dec	2nd Qtr Jan-Mar	3rd Qtr Apr-June	4th Qtr July-Sept	Total for Program Year

ATTACHMENT V

CSBG-D
One-Page CONTRACT BUDGET
(CM-469.xls)

LINE ITEM Definitions and Instructions

SALARIES and WAGES
Definition: Gross compensation paid to employees in the form of cash, products, or services including vacations, holidays, sick leave and leaves of absence.
Instructions: List positions and % of time spent on program activity, the annual salary amount, and the amount to be charged to this contract.

FRINGE BENEFITS
Definition: Funds allocated to cover allowances, costs and services provided by the grantee to or on behalf of its employees and not included as compensation or salaries and wages.
Instructions: Budget total cost for fringe benefits.

OCCUPANCY
Definition: Costs arising from occupancy and use of owned or leased buildings and offices.
Instructions: Identify each facility cost separately as either rent, depreciation or use charge and the amount. Identify utility/maintenance costs separately.

COMMUNICATIONS
Definition: Costs for written or verbal communication.
Instructions: Identify the type(s) of communication costs (examples: phone, fax, printed flyers, etc.).

SUPPLIES
Definition: Consumable or non-consumable items with a unit cost of less than $5,000. Consumable supplies are those items that are consumed as they are used. Non-consumable supplies are those that are not consumed as they are used (file cabinets, chairs, etc.).
Note: Software is considered a non-consumable supply and should be budgeted under "supplies" even if the cost exceeds $5,000.
Instructions: Identify costs separately as "consumable supplies" and/or "non-consumable supplies" and specifically identify any non-consumable item costing $1,000 or more.

EQUIPMENT
Definition: A non-consumable item costing $5,000 or more.
Note: Equipment purchases are not allowed under the contract.

TRANSPORTATION
Definition: Transportation costs include the cost of travel, lodging, meals and incidental expenses incurred by personnel in a travel status while on official business. See the Community Services Policy Manual, Item 405 – Travel Reimbursement Rates, for travel rate guidelines.
Instructions: Identify applicable travel cost items, such as mileage, meals, lodging, etc.

CSBG-D
One-Page CONTRACT BUDGET
(CM-469.xls)

LINE ITEM Definitions and Instructions

CONTRACTUAL SERVICES

Definition: Compensation paid by the Contractor to a third party under a subcontract agreement.
Instructions: List each subcontractor by name, include a brief explanation of the service to be provided and the cost of the service.
Note: Contracted services for clients should be included under "Specific Assistance to Individuals."

SPECIFIC ASSISTANCE TO INDIVIDUALS

Definition: Items of value purchased for, or services paid for, clients to be served under the contract.
Instructions: Identify types of services to be provided (examples: rent, utilities, car repair, etc.). For contracted services, list each subcontractor by name with a brief explanation of services to be provided.

MISCELLANEOUS

Definition: Expenses related to the contract which are not chargeable to other line items.
Instructions: List each miscellaneous cost item (examples: indirect costs, conference registration, rent for copy machine, etc.); any item with a cost of $1,000 or more should include the cost amount. Cost items that are designated "other" or "miscellaneous" are unacceptable
Note: When budgeting "indirect costs," a copy of the latest approved Indirect Cost Rate Agreement must be attached to the budget.

Note:

- In the FIA Contract Budget column, show one total cost for each Line Item.
- The Budget form is in Excel and is available by email; contact your CSBG grant manager.

Michigan Family Independence Agency - Office of Contracts and Rate Setting

CSBG-D Contract Budget

Contractor Name: _____

Contact Person: _____ Contract Amount: _____

Phone Number: _____ Budget Period: _____

Line Item DESCRIPTION			FIA Contract Budget
Salaries: (List Position Titles & % of Time spent on this program)	**Annual Salary**	**$ Amount charged to this contract**	
			0.00
			0.00
			0.00
			0.00
			0.00
			0.00
			0.00
			0.00
		Total Salaries:	
Fringe Benefits			
Occupancy (Describe Costs)			
Communication (Describe Costs)			
Supplies (Describe Costs)			
Equipment - N/A			0.00
Transportation - (Describe Costs)			
Contractual Services (List Contractors, Service & Cost)			
Specific assistance to individuals (List Services)			
Miscellaneous (List each cost item and identify the cost for any item of $1,000 or more.)			
		Total:	

ISSUANCES AFFECTED: A. REFERENCES 1996-1997 CSBG - Migrant Program

B. RESCISSIONS None

BACKGROUND: Community Services Block Grant (CSBG) funds, from the U.S. Department of Health and Human Services, are available to enhance allowable CSBG services to migrant or seasonal farm workers who meet CSBG income requirements. Eligibility is based on income guidelines included in this notice (125 percent of poverty income guidelines as published in the Federal Register March 4, 1996).

POLICY: See attached letters and guidelines.

ISSUANCES AFFECTED:

A. REFERENCES- None

B. RESCISSIONS- None

BACKGROUND:

The Family Independence Agency is redistributing $66,641 in PY03 WAP funds, based on LWO response to the December 3, 2003 FIA memo regarding DOE funds. FIA indicated that a review was in progress and requested feedback from each agency regarding expected production and spending. Since the requested additional funding exceeded the amount to be redistributed, FIA has distributed an additional $580,784 from the state administration funds to assure each agency receives the maximum amount of funding requested.

POLICY:

Local Weatherization Operators (LWOs) that will receive an increase/decrease to PY03 funds are to prepare and submit an amendment to the PY03 Weatherization Assistance Program Local Service Plan in accordance with the attached directions.

REQUEST FOR SERVICE PLAN
MICHIGAN WEATHERIZATION PLANNING INSTRUCTIONS

I. SUBMISSION OF PLAN MODIFICATION REQUEST

A. The amended plan must include the following in order:

1. Signed Weatherization Amendment- 2 originals
2. Signed Modification Request
3. Narrative*
4. Agency Organizational Chart reflecting all positions budgeted to the Weatherization program*
5. Program Account Budget Forms I, II, and III
6. Weatherization Unit Production Schedule and County Unit Production Schedule
7. Goals Summary
8. Staff Respondents Form

* These components required only if significantly changed from original PY03 documents.

B. LWOs are to submit FOUR sets (2-originals and 2 copies) of the Local Service Plan.

The Local Service Plan should be **postmarked by Friday, January 23, 2004** to:

Family Independence Agency
CSBG/Weatherization
Grand Tower--Suite 1314
P.O. Box 30037
Lansing, MI 48909

II. ALLOCATION - FUNDS

Attachment A shows individual total local agency funds for the PY03 Weatherization Program. Funding is based upon the availability of federal resources.

DOE continues to advise they expect 100% production and 100% expenditure of all funds. In response, the PY03 state plan indicates that FIA retains the right to adjust the contract amount for LWOs not meeting production and expenditure projections. To ensure we meet these expectations, we will continue to regularly review

production and expenditures using the Statement of Expenditures and Programmatic reports submitted. Based on this review, and input from the LWOs, any agency not expecting to spend funds or not meeting the projected production as indicated on the Production Schedule submitted with their PY2003 plan, will be contacted to discuss their allocation.

Only those agencies that have their funds increased or decreased must submit an amendment and revised plan.

III. PROGRAM PERIOD

LWOs are to plan budgets for the period April 1, 2003 through March 31, 2004.

IV. EXPENDITURE RATE/ALLOWABLE EXPENDITURES

DOE continues to allow states to permit LWOs, whose DOE allocation is less than $350,000, to use up to an additional 5 percent of funds for administrative costs. The allocation chart (Attachment A) includes the full additional 5 percent administrative allocation for applicable agencies. The additional administrative allocation can only be budgeted as follows:

1. To pay for essential equipment and/or services that can be demonstrated to directly enhance the accountability and performance effectiveness of the agency's weatherization program. The eligible equipment and/or services would be a part of the agency's central administrative structure and would either fully or partially be directly utilized for the agency's weatherization program.

2. For salaries and fringe benefits for agency <u>administrative</u> employees that work fully or partially for the provision of agency weatherization program services. An agency's weatherization coordinator's salary/fringes can be charged to this category for the time that he/she spends in administrative activities associated with the weatherization program. Any salaries/fringes charged to this category must be reconciled and supported by the agency's overall cost allocation plan.

3. For indirect costs as long as they are at an approved indirect cost rate.

If the agency does not require the full 5 percent of supplemental administrative funds, any balance must be added to the agency's "program" allocation with appropriate budget and production support adjustments.

Note: The redistribution of funds includes a proportionate amount of administrative funds. See Attachment A.

Agencies will be allowed to budget up to $2614 per unit average maximum for support/labor/materials costs. However, agencies should not automatically budget up to the $2614 per unit average cost level but should prepare the budget based on actual past experience and program needs.

Allowable Training and Technical Assistance (T/TA) expenditures include:

1. Cost of printing client education materials;

2. Cost of tuition and related charges for staff computer skills training directly related to weatherization program automation activities;

3. Expenses for staff attending appropriate State or DOE-sponsored weatherization training; including any mandatory training as determined by the State;

4. Expenses for staff attendance at Michigan Regional Weatherization Coordinator meetings;

5. Expenses for staff or contractors attendance at the DOE Regional and/or Affordable Comfort Conference;

6. Purchase of computer hardware/software for the operation of weatherization program;

7. Equipment or services that directly contribute to the overall effectiveness and efficiency of the agency's weatherization program (this must be justified in the agency plan);

8. Subscriptions to technical publications;

9. Salaries/fringe benefits of staff while attending an approved training activity.

10. Expenses associated with the Statewide evaluation of the weatherization program. (FIA will be conducting an evaluation of the energy savings of the weatherization program.)

Note: There is no additional T/TA funding in PY03 Amendment #1-#2 funds.

V. FISCAL REPORTING

Expenditure Reports: The Statement of Expenditures, FIA 4326, will be used in accordance with the Community Services Policy Manual Item 401.2. Receipt and approval of the monthly report will trigger reimbursement payments (minus recoupment of a portion of the initial advance).

VI. VEHICLES

Both FIA and USDOE must approve purchases prior to taking any action to purchase vehicles.

VII. GOALS SUMMARY (FIA-4322)

The client goals are as follows:

125% Poverty: More than 50 percent of households weatherized must be at or below 125% of poverty.

FIP/FS/SSI/SDA: The budget bill for FIA requires that 25 percent of households weatherized be receiving family independence program, food stamps, state disability assistance, or supplemental security income.

Elderly households: LWOs may determine goal (percentage) based on data for their service area or use 20 percent.

Disabled households: LWOs may determine goal (percentage) based on data for their service area or use 15 percent.

Native Americans: LWOs should use local available data to determine number of households.

VIII. LIABILITY INSURANCE

Agencies are required to maintain sufficient liability coverage for DOE funded activities. Liability insurance must cover the DOE required lead activities. DOE requires that all contractors, contractor crews and all local agency staff who work on a home be trained in Lead Safe Work (LSW) practices. Local agencies are responsible to make sure contractors have liability insurance for lead.

Local Weatherization program managers should check their agency's insurance policies to make sure they don't contain a clause that prohibits work in homes with lead-based paint.

Per the WAP's PY2002 Annual Guidance, WPN 02-1, agencies are required to have sufficient liability insurance coverage. LWOs should review their existing liability insurance policies. It is likely that general liability insurance has a pollution occurrence exclusion. When there is a gap in the coverage due to an exclusion, the agency has insufficient insurance. Therefore, LWOs are required to have Pollution Occurrence Insurance (POI). LWOs are strongly advised to either refer or defer weatherization work that will disturb surfaces that may contain lead-based paint, until they have insurance that provides coverage for LSW work situations involving lead-based paint.

Michigan worked with the National Association for State Community Services Programs (NASCSP) to purchase Pollution Occurrence Insurance. The cost for POI was estimated at $10 per unit weatherized for a total projected cost of $46,475. Michigan deducted this amount from the state admin funds and distributed it to each CAA/LWO based on projected unit production for each.

Liability insurance must be charged to the Liability Insurance line item in the budget. There is a revised budget form included in the plan materials that allows LWOs to report the amount for their regular liability insurance policy cost and the amount allocated for the POI insurance. See Program Account Budget III, FIA-4377P in Attachment C.

Note: No additional funding is included in PY03 Amendment #1 or #2 contracts for pollution occurrence insurance. Include the same amount originally budgeted for this item on the revised budgets. See the October 7, 2003 cover memo to the WAP Local Service Plan Modification for PY03-Amendment #1 (carryover) and Pollution Occurrence Insurance for instructions regarding reimbursement to agencies of any amount paid for pollution occurrence insurance that exceeds the original allocation.

IX. SERVICE PLAN

The PY03 Program Service Plan must include the following elements:

- A completed/signed Modification Request --(Attachment B).
- A summary narrative which provides a description of the major aspects of the methods of program operation. Format the narrative to address the topic headings listed below. **Note: A revised summary narrative is only required for those plans that include significant program changes.**

1. Program Operations. Identify specifically any decisions to fulfill production goals in less than 12 months and/or planned layoffs of staff for any period of time. LWOs must demonstrate sufficient year-round staffing to respond to weatherization program issues in a timely matter.

   Note: Do not repeat here the production figures reported on the Goals Summary or the amount of your agency allocation.

2. Basic service delivery mechanism program structure. Include summary of:
   - outreach/intake system
   - agency appeals process
   - agency walk-away policy
   - agency landlord contribution policy
   - use of private contractors/crews
   - method of installing measures
   - client education plan
   - pre/post inspection procedures
   - T/TA plan

3. Liability Insurance. Identify what fund source will pay for the Liability Insurance that is necessary for this program.

4. Other significant issues. Fully explain any waivers to be requested and any other major operational items in your plan

- Include a copy of the agency's weatherization program organization chart. **Note: Submit only if chart has changed since original PY03 plan was submitted.**

- Program Account Budgets I, II, and III--(Attachment C). Complete all lines and all columns.

  Note: Use the FIA-4377P to report the amount of regular liability insurance and your agency's allocation for POI.

- Weatherization Unit Production Schedule And County Unit Production Schedule-(Attachment D). For subgrantees serving more than one county, a break out of total production per county and percentage of production per county is required.

  Notes:

  - For this amendment, monthly and cumulative production numbers for the months of April 2003 through December 2003 must be actual.

- Wayne County agencies should show services to their specific service area communities.

- Goals Summary --(Attachment E).
- Staff Respondent Form --(Attachment F).

ATTACHMENT A

WEATHERIZATION ALLOCATIONS AND ESTIMATED UNITS CHART

April 1, 2003 - March 31, 2004

ATTACHMENT B

MODIFICATION REQUEST

MODIFICATION REQUEST

Family Independence Agency

COMPLETION: MANDATORY AS DIRECTED PENALTY: NON-ACCEPTANCE OF DOCUMENT	**THE FAMILY INDEPENDENCE AGENCY WILL NOT DISCRIMINATE AGAINST ANY INDIVIDUAL OR GROUP BECAUSE OF RACE, SEX, RELIGION, AGE, NATIONAL ORIGIN, COLOR, MARITAL STATUS, DISABILITY OR POLITICAL BELIEFS.**

1. GRANTEE NAME and ADDRESS	2. PROGRAM NAME and AGREEMENT NUMBER
	Department of Energy- Weatherization Assistance Program DOE-03-_____ Amendment 01

3. PERIOD of AGREEMENT	4. EFFECTIVE DATE OF PLAN/MOD
April 1, 2003 thru March 31, 2004	February 3 2004

5. SIGNATURE OF EXECUTIVE DIRECTOR	
	DATE:

FIA-1058 (01/02)

MODIFICATION REQUEST

Family Independence Agency

COMPLETION: MANDATORY AS DIRECTED PENALTY: NON-ACCEPTANCE OF DOCUMENT	**THE FAMILY INDEPENDENCE AGENCY WILL NOT DISCRIMINATE AGAINST ANY INDIVIDUAL OR GROUP BECAUSE OF RACE, SEX, RELIGION, AGE, NATIONAL ORIGIN, COLOR, MARITAL STATUS, DISABILITY OR POLITICAL BELIEFS.**

1. GRANTEE NAME and ADDRESS	2. PROGRAM NAME and AGREEMENT NUMBER
	Department of Energy- Weatherization Assistance Program DOE-03-_____ Amendment 02

3. PERIOD of AGREEMENT	4. EFFECTIVE DATE OF PLAN/MOD
April 1, 2003 thru March 31, 2004	February 3, 2004

5. SIGNATURE OF EXECUTIVE DIRECTOR	
	DATE:

FIA-1058 (01/02)

ATTACHMENT C

PROGRAM ACCOUNT BUDGET FORMS

Program Account Budget I

Program Account Budget II

Program Account Budget III

Program Account Budget I – WEATHERIZATION ASSISTANCE PROGRAM Family Independence Agency		Date Submitte
AGENCY NAME:	AUTHORITY : P.A. 230 of 1981 COMPLETION: MANDATORY PENALTY : NO FUNDS RELEASED	THE MICHIGAN F DISCRIMINATE A OF RACE, SEX, R MARITAL STATU

PROGRAM NAME: **Department of Energy**	TYPE OF BUDGET [ ] Program Account [ ] Composite	BEGINNING DATE:	ENDING DATE:

BUDGET SUMMARY

COST CATEGORY NUMBER	COST CATEGORY	TOTAL BUDGET (1)	ADMIN (2)	T & TA (3)	SUPPORT (4)	LABOR (5)	MATE (6
1.1	WAGES						
1.2	FRINGE BENEFITS						
1.3	CONSULTANTS AND CONTRACT SERVICES						
2.1	TRAVEL						
2.2	SPACE COSTS						
2.3	CONSUMABLE SUPPLIES						
2.4	EQUIPMENT						
2.5	OTHER COSTS						
TOTAL COSTS:							

Program Account Budget II --Weatherization Assistance Program

Family Independence Agency

Date Submitte

AGENCY NAME:

AUTHORITY : P.A. 230 of 1981
COMPLETION: MANDATORY
PENALTY : NO FUNDS RELEASED

THE MICH
NOT DISC
BECAUSE
ORIGIN, C
POLITICAI

WAGES

POSITION Title of Each Position (one Person Per Line)	ANNUALIZED SALARY	TOTAL PROGRAM	ADMIN	T & TA
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				
11.				
12.				
13.				
TOTALS				

FIA-4376 (03/01)

Program Account Budget III - Weatherization Assistance Program

Family Independence Agency

AGENCY NAME:	BEGINNING DATE:	ENDING DATE:	AUTHORITY : P.A. 230 of 1981 COMPLETION: MANDATORY PENALTY : NO FUNDS RELEASED	THE MICHI DISCRIMIN BECAUSE ORIGIN, C POLITICAL

BUDGET SUPPORT DATA

COST CAT. NO. (1)	DESCRIPTION OF ITEM AND BASIS FOR VALUATION (2)	BUDGETED AMOUNT				
		TOTAL (3)	ADMIN (4)	T/TA (5)	SUPPORT (6)	LABOR (7)
PAGE SUBTOTALS						
PRECEDING PAGE TOTALS						
TOTALS						

FIA-4377 (02/02)

Program Account Budget III - Weatherization Assistance Program

Family Independence Agency

AGENCY NAME:	BEGINNING DATE:	ENDING DATE:	AUTHORITY : P.A. 230 of 1981 COMPLETION: MANDATORY PENALTY : NO FUNDS RELEASED	THE MICHI DISCRIMIN BECAUSE ORIGIN, C POLITICAL

BUDGET SUPPORT DATA

COST CAT. NO. (1)	DESCRIPTION OF ITEM AND BASIS FOR VALUATION (2)	BUDGETED AMOUNT					
		TOTAL (3)	ADMIN (4)	T/TA (5)	SUPPORT (6)	LABOR (7)	M
	POLLUTION OCCURRENCE INSURANCE						
	OTHER LIABILITY INSURANCE						
PAGE SUBTOTALS							
PRECEDING PAGE TOTALS							
TOTALS							

FIA-4377P (03/03)

ATTACHMENT D

WEATHERIZATION UNIT PRODUCTION SCHEDULE AND COUNTY UNIT PRODUCTION SCHEDULE

WEATHERIZATION UNIT PRODUCTION SCHEDULE AND COUNTY UNIT PRODUCTION SCHEDULE

Family Independence Agency

AUTHORITY: P.A. 230 of 1981
COMPLETION: MANDATORY
PENALTY: NO FUNDS RELEASED

THE MICHIGAN FAMILY INDEPENDENCE AGENCY WILL NOT DISCRIMINATE AGAINST ANY INDIVIDUAL OR GROUP BECAUSE OF RACE, SEX, RELIGION, AGE, NATIONAL ORIGIN, COLOR, MARITAL STATUS, DISABILITY OR POLITICAL BELIEFS.

NAME OF AGENCY	BEGINNING DATE:	ENDING DATE:

	April	May	June	July	August	September	October	November	December	January	February	March	TOTAL
Monthly Units													
Cumulative Units PYTD													

COUNTY/CITY UNIT PRODUCTION

INSTRUCTIONS: List Total unit completions by county (by city if appropriate), with the corresponding percentage of the total units. Each Subgrantee should determine an equitable production by county or city.

COUNTY/CITY	ESTIMATED UNITS	% OF TOTAL	COUNTY/ CITY	ESTIMATED UNITS	% OF TOTAL
TOTALS			TOTALS		

FIA-4321 (3/03)

ATTACHMENT E

GOALS SUMMARY

GOALS SUMMARY

Family Independence Agency

AUTHORITY : P.A. 230 of 1981 COMPLETION: MANDATORY PENALTY: NO FUNDS RELEASED	THE FAMILY INDEPENDENCE AGENCY WILL NOT DISCRIMINATE AGAINST ANY INDIVIDUAL OR GROUP BECAUSE OF SEX, RACE, RELIGION, AGE, NATIONAL ORIGIN, COLOR, MARITAL STATUS, DISABILITY OR POLITICAL BELIEFS.
NAME OF AGENCY	PROGRAM YEAR

I. CLIENT PRIORITY GOALS

A. FAMILY INDEPENDENCE PROGRAM (FIP), FOOD STAMPS (FS), STATE DISABILITY ASSISTANCE (SDA), AND SUPPLEMENTAL SECURITY INCOME (SSI) UNITS

a. Total Units To Be Completed: _____ b. Percentage Minimum: 25% c. (a. X b. = Total FIP, FS, SDA, SSI): _____Units (round units up)

B. ELDERLY UNITS (Use 20% as a goal unless other data is available)

a. Total Units To Be Completed: _____ b. Percentage Minimum: _____% c. (a. X b. = Total Elderly Units): _____Units (round units up)

d. Specify Source Of Data Used To Support Percentage If Not Using 20%:

C. DISABLED UNITS (Use 15% as a goal unless other data is available)

a. Total Units To Be Completed: _____ b. Percentage Minimum: _____% c. (a. X b. = Total Disabled Units): _____Units (round units up)

d. Specify Source Of Data Used To Support Percentage If Not Using 15%:

II. OTHER GROUPS TO BE SERVED

A. 125% OF POVERTY

a. Total Units To Be Completed: _____ b. Percentage Minimum 50.1% c. (a. x b. = Total Poverty Units): _____Units (round units up)

B. NATIVE AMERICAN UNITS (FIA has no set priority percentage but expects subgrantees to make efforts to proportionately serve Native Americans.)

a. Estimate The Number Of Low-Income Native American Households In Your Service Area: _____ b. Estimate The Number Of Native American Units To Be Served: _____

c. Specify Source Data Used To Determined Number In Your Service Area:

IV. UNIT COST SUMMARY

A Completed Unit: All weatherization materials have been installed and a final inspection completed.

A. Average Cost Per Unit: Material + Support + Labor ÷ Total Units = $_____ **(Cannot exceed $2614 per unit)**

ATTACHMENT F

STAFF RESPONDENTS FORM

STAFF RESPONDENTS

Family Independence Agency

AUTHORITY : P.A. 230 of 1981 COMPLETION: MANDATORY PENALTY : NO FUNDS RELEASED	THE MICHIGAN FAMILY INDEPENDENCE AGENCY WILL NOT DISCRIMINATE AGAINST ANY INDIVIDUAL OR GROUP BECAUSE OF RACE, SEX, RELIGION, AGE, NATIONAL ORIGIN, COLOR, MARITAL STATUS, DISABILITY OR POLITICAL BELIEFS.

TO ASSIST STATE STAFF IN EXPEDITING THE PROCESSING OF THIS PLAN, PLEASE IDENTIFY AGENCY REPRESENTATIV WHO CAN ANSWER SUBSTANTIVE AND TECHNICAL QUESTIONS ABOUT THE PLAN. CONTACT WILL BE MADE WITH THE IDENTIFIED INDIVIDUALS VIA TELEPHONE OR IN PERSON TO OBTAIN CLARIFICATION OR TO REQUEST ADDITIONAL INFORMATION.

NOTE: Respondent #1 should be the main contact regarding this plan. The agency is encouraged to identify the agency planner or program manager if this is appropriate (Rather than the executive director).

Respondent #1

Name: _____

Title: _____Phone No. _____ Email _____

Respondent #2

Name: _____

Title: _____Phone No. _____ Email _____

Respondent #3

Name: _____

Title: _____Phone No. _____ Email _____

Respondent #4

Name: _____

Title: _____Phone No. _____ Email _____

FIA-1065 (10/03)

BACKGROUND:

The Department of Health and Human Services (HHS) has allocated LIHEAP funds to Michigan, of which $7,000,000 has been made available to Local Weatherization Operators (LWOs) for weatherization. See the LIHEAP Allocation Chart, Attachment A.

PURPOSE:

To provide LWOs with policy guidelines and service plan instructions regarding the use of LIHEAP funds for the period from September 1, 2003 through August 31, 2004.

POLICY:

LWOs are required to administer this grant following HHS LIHEAP regulations and U.S. Department of Energy (DOE) Weatherization Assistance Program (WAP) regulations. Note: See CSPM Item 703, Program Requirements (LIHEAP)

Cost Allocation Limitations

- The maximum amount for "administration" is 5% of the agency's LIHEAP allocation.
- The maximum amount for "support" is **20**% of the agency's LIHEAP allocation. This percentage is based on the intended use of these funds to be spent for weatherization activities in combination with DOE funds to provide maximum energy conservation measures.
- Funds should be spent throughout the grant period.
- Any funds budgeted for liability insurance or training activities must be included under "administration" or "support."
- LIHEAP funds may not be used for equipment purchases.
- See CSPM Item 402.3, Cost Categories LIHEAP, for descriptions of cost categories.

SERVICE PLAN INSTRUCTIONS

The following forms must be submitted to amend the Local Service Plan:

- A completed, signed Plan Request.

- Agency Organizational Chart reflecting all positions budgeted to LIHEAP
- A Summary Narrative describing the proposed programmatic use of LIHEAP funds.
- Program Account Budgets (FIA-4375, FIA-4376 and FIA-4377).
- Staff Respondent form

NOTE: A package including these forms is attached. You do not need to incorporate these forms into your CSPM manual.

REPORTING PROCESS

* A Statement of Expenditures report (FIA-4326) must be submitted each month. For the month of September, billings shall be submitted as directed by FIA to meet fiscal year-end closing deadlines and must be marked **final** on the report.

* All reporting requirements currently applicable for DOE-WAP will be utilized for the LIHEAP grant.

* The LIHEAP Activity Report (FIA-1073) must be completed and submitted by September 30, 2004.

ACTION:

LWOs shall prepare the LIHEAP Service Plan in accordance with the instructions and policy noted above.

Please submit four copies, two with original signatures, to:

Family Independence Agency
Grand Tower, Suite 1314
P.O. Box 30037
Lansing, Michigan 48909

INQUIRIES:

In accordance with the Americans With Disabilities Act, the information contained in this document will be made available in alternative format (large type, audiotape, etc.) upon special request.

LIHEAP ALLOCATION
September 1, 2003 through August

Local Weatherization Operators (LWOs)	Allocat	Advance		
Alger-Marquette CAB	111,119	11,112	208,521	1.58741%
Allegan County RDC	88,774	8,877	166,589	1.26820%
ACSET Area Community Service	245,162	24,516	460,060	3.50231%
Baraga-Houghton-Keweenaw	110,980	11,098	208,260	1.58543%
Capital Area Community Services	275,733	27,573	517,429	3.93905%
Chippewa-Luce-Mackinac	102,505	10,250	192,356	1.46435%
City of Dearborn	87,204	8,720	163,641	1.24575%
City of Detroit (DHS)	1,293,217	129,322	2,426,797	########
Community Action Agency	198,956	19,896	373,353	2.84223%
Community Action Agency So. Ce	216,244	21,624	405,794	3.08920%
Dickinson-Iron CAA	102,003	10,200	191,415	1.45719%
Downriver Comm. Conf.	168,684	16,868	316,545	2.40977%
Economic Opportunity St. Clair	124,765	12,476	234,128	1.78235%
EightCAP	182,863	18,286	343,153	2.61233%
FiveCAP	139,430	13,943	261,648	1.99185%
Genesee County CARD	307,775	30,778	577,558	4.39679%
Gogebic-Ontonagon CAA	93,017	9,302	174,551	1.32881%
Human Development Commission	175,880	17,588	330,048	2.51257%
Kalamazoo County CAA	152,428	15,243	286,039	2.17754%
Macomb County CSA	280,667	28,067	526,687	4.00952%
Menominee-Delta-Schoolcraft	119,728	11,973	224,677	1.71040%
Mid-Michigan CAA	264,783	26,478	496,880	3.78261%
Monroe County Opportunity	98,001	9,800	183,904	1.40001%
Muskegon-Oceana CAAP	175,228	17,523	328,825	2.50326%
Northeast Michigan CSA	229,999	23,000	431,607	3.28571%
Northwest Michigan HSA	211,430	21,143	396,760	3.02043%
Oakland Livingston HSA	403,332	40,333	756,875	5.76188%
Ottawa County CAA	96,812	9,681	181,673	1.38303%
Saginaw County CAC	192,005	19,200	360,308	2.74293%
Southwest Michigan CAA	231,549	23,155	434,514	3.30784%
Washtenaw County CSA	147,959	14,796	277,654	2.11370%
Wayne County	257,611	25,761	483,422	3.68016%
Wayne Metro CSA	114,159	11,416	214,226	1.63084%
T O T A L	$7,000,000	700,000	########	########
$7,000,000	7,000,000	700,000		

file:J:/C PM/liheap/Allocationfor 03

PURPOSE:

To provide CAAs with instructions regarding administration of State Emergency Funds (SEF).

BACKGROUND:

The State of Michigan, Family Independence Agency, has made available to CAAs $2 million from the State Emergency Relief (SER) line item of its budget. These funds are allocated to CAAs to enable them to respond to emergency needs of low income households. Emergency needs are sudden or unforeseen one-time only situations that require immediate action and should not be of an ongoing nature. The use of these funds must be coordinated with other area emergency service providers. See the "Coordination" section later in this item. Funds may also be used to support essential outreach and information and referral activities related to the operation of other critical needs programs. See the "Allowable Emergency Services", "Financial Management" and "Cost Category Limitations" sections later in this item.

Note: Policy regarding use of SER funds administered by county FIA offices does not apply to these funds.

POLICY:

Funding Period

The funding period will be October 1 through September 30. All unexpended funds will lapse at the end of the funding period.

Allocation of Funds

Funds are allocated using a base of $4200, with the balance based on the CAA's relative percentage of persons in the state at or below 125% of poverty.

- CAA allocations are shown in Attachment A.
- There will be no redistribution of funds later in the program year.

Agreement Instructions

The SEF Agreement must be signed by the person having lawful authority to bind the Grantee to its terms. The signature must be witnessed. Return both originals of the signed, dated and witnessed Agreement to your grant manager at:

Family Independence Agency
CSBG/Weatherization
PO Box 30037
Grand Tower, Suite 1314
Lansing, MI 48909

The SEF Agreement, in conjunction with the Master Agreement, will constitute the full contractual agreement between FIA and the CAA for administration of SEF funds.

Eligibility Requirements

Eligible households must meet 125% of poverty income requirements based on U.S. Department of Health and Human Services poverty guidelines. See CSPM Item 801, Income Eligibility Guidelines, for poverty guidelines and definitions of income.

If the local FIA office has determined the household to be income eligible for the SER program in the last 30 days, the household is automatically income eligible for the SEF program.

A household does not have to be denied SER assistance by the local FIA office in order to be eligible.

CAAs may use SEF to pay for emergency needs for SEF-eligible households that have been denied SER benefits by the local FIA office.

Coordination

The use of these funds must be coordinated with local FIA agencies and other emergency service providers, as appropriate, by prior discussion with them on the CAA's proposed use of funds and target population(s). Coordination should

include, to the extent feasible, procedures which foster maximum participation by eligible persons who are in need, and minimize duplication of services.

Financial Management

The CAA may set a maximum amount per emergency service and a maximum amount per household.

The CAA may spend funds directly or subcontract them.

Cost Category Limitations

Administration

Allowable administrative costs are limited to wages and fringe benefits for administration of SEF or other critical needs programs.

Administrative expenses may not exceed 15% of the CAA's allocation.

The allowable administrative cost portion not used for administrative expenses may be used for Information/Referral/Outreach.

Information/Referral/Outreach

Allowable information, referral and outreach costs are limited to wages and fringes for directly providing the SEF activity or other critical needs programs.

Information, referral, and outreach expenses may not exceed 15% of the CAA's allocation, except any unspent portion of the allowable 15% administrative costs may be used for information, referral and outreach.

ALLOWABLE EMERGENCY SERVICES

The following chart (Attachment B) contains the allowable emergency services and the required demonstration of need for each . Anything not included in this listing requires an exception request be submitted to the grant manager.

Requests for exceptions to provide repeat emergency services to the same household or to provide other emergency services not included, must include written justification and may be granted, but only with prior approval by the grant manager.

Demonstration of Need must be documented in the client file for each time and each type of service provided.

Note: SEF funds cannot be used to establish SER eligibility by making required payments or making client copays. If an SER application is denied for these reasons and the household is determined to be SEF eligible, the entire amount must be paid using SEF. SEF monies may also be used to expand SER payment maximums if all other eligibility requirements are met.

Activity Report

Each agency must complete SEF Program Activity Report, FIA-1932, identifying the activities in the funding period. The report is due one month after the end of the PY on October 31.

Billing and Financial Reporting

Report monthly expenditures on the FIA-3009, Statement of Expenditures.

Submit one original and two copies of the FIA-3009, no later than 30 days after the report month, to:

Family Independence Agency
CSBG/Weatherization
PO Box 30037
Grand Tower, Suite 1314
Lansing, MI 48909

Initial Payment

An advance of 20% will be processed for payment to the CAA upon completion of FIA processing of the SEF Agreement but not earlier than October 1. A copy of the signed agreement will be returned to the CAA. Subsequent payments in response to the FIA-3009 will be reduced to recover the advance.

Fy01 - STATE EMERGENCY FUNDS ALLOCATION

COMMUNITY ACTION AGENCY	Persons At 125% Of Poverty		$4200 Base + Percentage	20% Advance
	Number	Percent		
ACSET (Area Community Services E&T)	61,273	4.00%	79,143	15,829
Alger-Marquette CAB	13,894	.91%	21,194	4,239
Allegan Co. RDC	11,454	.75%	18,209	3,642
Baraga-Houthton-Keweenaw CAA	11,967	.78%	18,837	3,767
CAA Jackson, Lenawee, Hillsdale	42,090	2.75%	55,680	11,136
CAA South Central	48,176	3.14%	63,124	12,625
Capital Area	77,110	5.03%	98,513	19,702
Chipewa-Luce-Mackinac CAAHRA	10,952	.71%	17,595	3,519
Detroit (DHS)	384,846	25.11%	474,904	94,980
Dickinson-Iron CAA	7,223	.47%	13,034	2,607
EightCAP	20,961	1.37%	29,837	5,967
EOC St. Clair	40,565	2.65%	53,815	10,763
FiveCAP	22,026	1.44%	31,140	6,228
Genesse Co. CAA	85,918	5.61%	109,286	21,857
Gogebic-Ontonagan CAA	5,577	.36%	11,021	2,204
Human Development Comm	32,758	2.14%	44,266	8,853
Kalamazoo Co. HDB	35,577	2.32%	47,714	9,543
Macomb Co. CSA	52,029	3.40%	67,837	13,567
Menominee-Delta-Schoolcraft	14,061	.92%	21,398	4,280
Mid-MI CAA	59,527	3.89%	77,007	15,401
Monroe COOP	15,676	1.02%	23,373	4,675
Muskegon-Oceana CAAP	36,095	2.36%	48,348	9,670
Northeast MI CSA	40,982	2.67%	54,325	10,865
Northwest MI HAS	38,646	2.52%	51,468	10,294
Oakland-Livingston HSA	93,188	6.08%	118,178	23,636
Ottawa Co. CAA	14,567	.95%	22,017	4,403
Saginaw Co. CAC	44,843	2.93%	59,047	11,809
Southwest MI CAA	53,060	3.46%	69,098	13,820
Washtenaw Co. ET&CSG	39,640	2.59%	52,684	10,537
Wayne Metro CSA	117,494	7.67%	147,908	29,582
TOTAL	1,532,175	100.00%	2,000,000	400,000

Attachment B

ALLOWABLE EMERGENCY SERVICES & DEMONSTRATION OF NEED

Following is the list of **allowable** emergency services and the **required** demonstration of need for each. Anything not included in this listing requires an exception request be submitted to the grant manager. N**OTE:** Demonstration of Need **must** be documented in the client file for each time and each type of service provided.

ALLOWABLE SERVICES	DEMONSTRATION OF NEED
Relocation Services:	
• Temporary Shelter Expenses* • First Month's Rent • Rent Arrearage • Security Deposit (if required) • Moving Expenses (to relocate household effects)	Homeless: living in an emergency shelter, transitional facility, sleeping in car, has no home to return to, domestic violence situation. Recommend that these services be pursued through The Salvation Army's emergency shelter program first; contact them at: 1-800-A SHELTER Eviction: a court summons, order, or judgment**, or legal notice from a local public agency to vacate condemned housing. ****Note:** If agency wants to change policy and accept notice to quit for evictions, FIA must be notified first. Reestablish dwelling after disaster; fire, flood, etc.- circumstances must be noted in client file.
Home Ownership Services: **HOME OWNERS ONLY**	**You must obtain proof of home ownership AND document proof in case file PRIOR to providing home ownership services.**
• House/Land Contract Payments • Property Taxes & Fees • Mobile Home Lot Rent • House Insurance • Emergency Home repairs-includes, but is not limited to, well & septic system repairs required for Health & Safety reasons.	Foreclosure/Forfeiture: court order or any written statement from a contract holder; a court order summons, order of judgement. Property Tax Sale: written statement from taxing authority warning of a sale or a collateral contact. Well and/or Septic repair: need must be documented by local public health agency or in situations where local FIA has agreed to pay partial costs.
Heat & Utility Services:	
• Heat • Electric • Water or Cooking Gas • Deposits • Fees for Connection, Reconnection or Hookups	Actual or threatened shutoff: by written notice or telephone call to utility company with worker notes in client file Cooking gas & deliverable fuel: client statement Fees for Connection, Reconnection or Hookups: Fee schedule or phone contact with utility provider
Household Contents:	
• Food • Stoves & Refrigerators • Beds, Tables, & Chairs • Household Items- these are housekeeping items; examples include: dishes, silverware, pots & pans, brooms & mops, bed sheets, pillows or towels. • Air conditioner	Household contents: the worker should document circumstances in case file; client statement is sufficient for all listed EXCEPT air conditioner purchase (See below) Air conditioner purchase: client **must be:** 55 years of age or older, **OR** provide a physician's statement indicating that the air conditioner is medically required.
Medication	Prescription

PURPOSE:

To provide CAAs with instructions regarding administration of the Temporary Assistance for Needy Families (TANF) funds.

BACKGROUND:

$2.35 million in federal TANF funds are available to CAAs to enable them to:

- provide assistance to needy families so that children may be cared for in their own homes or in the homes of relatives,
- end dependence of needy parents on government benefits by promoting job preparation, work and marriage,
- prevent and reduce the incidence of out-of-wedlock pregnancies, and
- encourage the formation and maintenance of two-parent families.

POLICY:

Funding Period

The funding period will be October 1 through September 30. All unexpended funds will lapse at the end of the funding period.

Allocation of Funds

Funds are allocated using a base of $4200, with the balance based on the CAA's relative percentage of persons in the state below 125% of poverty. CAA allocations are shown in the TANF Allocation Chart at the end of this item.

Agreement Instructions

The TANF Agreement must be signed by the person having lawful authority to bind the Grantee to the terms. The signature must be witnessed. Return both originals of the signed, dated and witnessed Agreement to your grant manager at:

Family Independence Agency
Community Services
P.O. Box 30037
Grand Tower, Suite 1314
Lansing, MI 48909

The TANF Agreement, in conjunction with the Master Agreement, will constitute the full contractual agreement between FIA and the CAA for the administration of the TANF funds.

Eligibility Requirements

Eligible households must:

- include a pregnant member, **or** a child under age 18 **or** a child age 18 who is in high school full time **and**

- be at or below 200% of poverty income requirements based on U.S. Department of Health and Human Services poverty guidelines. Recipients of Family Independence Program (FIP), Food Stamps, Medicaid and Child Day Care meet these income eligibility criteria and are considered automatically income eligible for TANF services.

See CSPM Item 901, Household Composition and Income Eligibility Guidelines, for household composition requirements, automatic income eligibility, poverty guidelines and definitions of income.

Coordination

CAAs are encouraged to work with their community partners in identifying needs that can be addressed using these funds.

Cost Category Limitations

Administration

Allowable administrative costs include costs necessary for the proper administration of the program. Examples of administrative costs include:

- Salaries and benefits of staff performing administrative and coordination functions;
- Activities related to eligibility determination;
- Preparation of program plans, budgets and schedules;
- Services related to accounting, litigation, audits, management of property, payroll and personnel.

Administrative expenses may not exceed 15% of the CAA's allocation.

Billing and Financial Reporting

Report monthly expenditures on the FIA-3470, Statement of Expenditures.

Submit one original and two copies of the FIA-3470, no later than 30 days after the report month, to:

Family Independence Agency
Community Services
PO Box 30037
Grand Tower, Suite 1314
Lansing, MI 48909

ALLOWABLE ACTIVITIES

Allowable activities include:

- Non-recurrent, short-term benefits, which:
  1. are designed to deal with a specific crisis situation of need;
  2. are not intended to meet recurrent or ongoing needs; and
  3. will not extend beyond four months;

- Supportive services, such as child care and transportation, provided to families who are employed;

  Note: *"Employed"* means a member of the family:
  - Is receiving compensation for services performed; or
  - Received compensation for services performed within the last 90 days; or
  - Has a specific job offer.

  Note: Child Care: TANF funds should be used for child care ONLY if the family is NOT eligible for this service through FIA. Payment for child care services may only be paid to child care providers that are licensed or registered by the Department of Consumer and Industry Services, Child Day Care licensing.

- Other services, such as counseling, case management, peer support, child care information and referral, and transitional services, that do not provide basic income support.

UNALLOWABLE ACTIVITIES

Unallowable activities include:

- The purchase or improvement of land
- The purchase, construction, or permanent improvement of any building or other facility
- Cash, payments, vouchers, and other forms of benefits designed to meet a family's ongoing basic needs (i.e., food, clothing, shelter, housing subsidies, utilities, household goods, personal care items and general incidental expenses).
- Medical services

  Note: Medical services are services provided for the purpose of diagnosing, treating or preventing disease. Disease refers to any condition of physical or mental ill health, regardless of the cause. Typically, medical services include those services covered by the Medicaid program or other health insurance plans, or provided by Community Public Health.

  Exception: TANF funds may be used to cover medical/dental services not billable to Medicaid.
- Ongoing child care, transportation and supports for families that are not employed.
- Car purchase and repair: TANF cannot be used to supplement the limits for auto repair ($900 in a 12 month period) or auto purchase ($1,200 lifetime) for FIP and employed Food Stamp, Medical Assistance and Day Care families who are eligible for this service through FIA or the Michigan Works Agency (MWA).

  Exception: TANF may only be used to purchase or repair cars for clients who are not eligible for this service from FIA or MWA.

SERVICE PLAN INSTRUCTIONS

The CAA shall prepare and submit a service plan in accordance with the following instructions. **The submittal due date is September 2, 2003.** Submit 4 copies, 2 with original signatures, to:

Family Independence Agency
Community Services
PO Box 30037
Grand Tower, Suite 1314
Lansing, MI 48909

The FY04 program service plan must include the following elements:

- A completed and signed Plan Request – (Attachment A)
- A completed Plan Narrative (Attachment B)
- Contract Budget (CM-469ex-Attachment C).
- Staff Respondents Form – (Attachment D).

Plan Narrative – Attachment B

Provide a detailed description for each activity and/or service for which you will use TANF funding. Use the following outline for each activity or service:

- Project/Activity Name
- The need that is being addressed.
- A description of the activity and its main objectives. (Be specific and identify what services will be provided to what population, e.g., FIP, Work First, etc.)
- The project period.
- The target population: Include where the clients will be coming from or how they are identified for the specific project/activity; e.g., clients seeking emergency assistance for utility services, clients referred by another human services agency, clients referred by utility company, clients currently involved in a specific agency program, etc.
- Coordination: Identify the other agencies or groups that will be involved and how they will participate.

Also describe any other activities conducted by your agency that **are not supported by this funding** but are specifically connected as part of the overall scope of the project.

FYO4 TEMPORARY ASSISTANCE TO NEEDY FAMILIES (TANF) ALLOCATION				
	Persons at 125% of Poverty		$4200 Base +	Advance
Community Action Agency	**Percent**	**Percent Share**	**Percentage**	**Amount**
ACSET	5.10%	113,424	$117,624	23,525
Alger-Marquette CAB	0.80%	17,792	$21,992	4,398
Allegan County RDC	0.80%	17,792	$21,992	4,398
Baraga-Houghton-Keweenaw CAA	0.70%	15,568	$19,768	3,954
CAA Jackson, Lenawee, Hillsdale	2.50%	55,600	$59,800	11,960
CAA South Central MI	3.00%	66,720	$70,920	14,184
Capital Area Community Services	5.10%	113,424	$117,624	23,525
Chippewa-Luce-Mackinac CAAHRA	0.70%	15,568	$19,768	3,954
Detroit (DHS)	22.20%	493,728	$497,928	99,586
Dickinson-Iron CAA	0.40%	8,896	$13,096	2,619
EOC St. Clair	1.30%	28,912	$33,112	6,622
EightCAP	2.60%	57,824	$62,024	12,405
FiveCAP	1.30%	28,912	$33,112	6,622
Genessee Co. CARD	5.40%	120,096	$124,296	24,859
Gogebic-Ontonagon CAA	0.30%	6,672	$10,872	2,174
Human Development Comm.	1.90%	42,256	$46,456	9,291
Kalamazoo Co. HDB	2.60%	57,824	$62,024	12,405
Macomb Co. CSA	4.50%	100,080	$104,280	20,856
Menominee-Delta-Schoolcraft	0.80%	17,792	$21,992	4,398
Mid-Mi CAA	3.60%	80,064	$84,264	16,853
Monroe COP	1.00%	22,240	$26,440	5,288
Muskegon-Oceana CAP	2.30%	51,152	$55,352	11,070
Northeast Michigan CSA	2.50%	55,600	$59,800	11,960
Northwest Michigan	2.50%	55,600	$59,800	11,960
Oakland-Livingston	7.00%	155,680	$159,880	31,976
Ottawa Co. CAA	1.30%	28,912	$33,112	6,622
Saginaw Co. CAC	2.70%	60,048	$64,248	12,850
Southwest MI CAA	3.40%	75,616	$79,816	15,963
Washtenaw Co. ET. & CSG	3.00%	66,720	$70,920	14,184
Wayne Metro CAA	8.70%	193,488	$197,688	39,538
TOTAL	100.00%	$ 2,224,000	$2,350,000	$ 470,000

ATTACHMENT A

PLAN REQUEST

PLAN REQUEST

Family Independence Agency

COMPLETION: MANDATORY AS DIRECTED PENALTY: NON-ACCEPTANCE OF DOCUMENT	**THE FAMILY INDEPENDENCE AGENCY WILL NOT DISCRIMINATE AGAINST ANY INDIVIDUAL OR GROUP BECAUSE OF RACE, SEX, RELIGION, AGE, NATIONAL ORIGIN, COLOR, MARITAL STATUS, DISABILITY OR POLITICAL BELIEFS.**

1. AGENCY NAME AND ADDRESS	2. FUND SOURCE and AGREEMENT NUMBER
	Temporary Assistance to Needy Families (TANF) TANF-04- _____

3. PERIOD OF AGREEMENT	4. EFFECTIVE DATE OF PLAN/MOD
October 1, 2003 through September 30, 2004	October 1, 2003

SIGNATURE OF EXECUTIVE DIRECTOR

5. EXECUTIVE DIRECTOR	
	DATE:

(08/03)

ATTACHMENT B

PLAN NARRATIVE

Provide a detailed description for each activity and/or service you plan to provide using TANF funds. (See CSPM Item 307 for details and outline to be used.)

ATTACHMENT C

CONTRACT BUDGET (CM-469ex)

Michigan Family Independence Agency - Office of Contracts and Rate Setting

	Contract	**Budget**		
Contractor Name:				
	Contract Number:	Contract Amount:		
Local / Prog. Office:	**NA**	Budget Period:		
Administrator Name:	**NA**	Phone Number:		
Line Item		**Total Contract Budget**	**ADM ***	**Non-ADM**
Salaries (List positions, annual salaries and % of time spent on program.)				
Fringe benefits				
Occupancy				
Communication				
Supplies				
Equipment				
Transportation				
Contractual Services - List				
Specific assistance to individuals				

Miscellaneous (Identify by cost item.)			
Total:			
*Costs in this column must meet the definition in CSPM Item 307 and cannot exceed 15% of the total Contract budget.			
CM-469ex (OCRS REV. 6/00)	[Adapted for CAA TANF Budgets 8/00]		

ATTACHMENT D

STAFF RESPONDENTS FORM

STAFF RESPONDENTS

Family Independence Agency

AUTHORITY : P.A. 230 of 1981 COMPLETION: MANDATORY PENALTY : NO FUNDS RELEASED	THE MICHIGAN FAMILY INDEPENDENCE AGENCY WILL NOT DISCRIMINATE AGAINST ANY INDIVIDUAL OR GROUP BECAUSE OF RACE, SEX, RELIGION, AGE, NATIONAL ORIGIN, COLOR, MARITAL STATUS, DISABILITY OR POLITICAL BELIEFS.

TO ASSIST STATE STAFF IN EXPEDITING THE PROCESSING OF THIS PLAN, PLEASE IDENTIFY AGENCY REPRESENTATIVES WHO CAN ANSWER SUBSTANTIVE AND TECHNICAL QUESTIONS ABOUT THE PLAN. CONTACT WILL BE MADE WITH THE IDENTIFIED INDIVIDUALS VIA TELEPHONE OR IN PERSON TO OBTAIN CLARIFICATION OR TO REQUEST ADDITIONAL INFORMATION.

NOTE: Respondent #1 should be the main contact regarding this plan. The agency is encouraged to identify the agency planner or program manager if this is appropriate (Rather than the executive director).

Respondent #1

Name: _____

Title: _____ Phone No. _____

Respondent #2

Name: _____

Title: _____ Phone No. _____

Respondent #3

Name: _____

Title: _____ Phone No. _____

Respondent #4

Name: _____

Title: _____ Phone No. _____

FIA-1065 (03/01)

PURPOSE:

To provide CAAs with instructions regarding administration of Michigan Public Service Commission (MPSC) funds

BACKGROUND:

The State of Michigan, Family Independence Agency, has received $1.5 million from the Michigan Public Service Commission for Emergency Energy Assistance. These funds are allocated to CAAs to enable them to provide emergency energy assistance to low-income households. The use of these funds should be coordinated with other area emergency service providers.

Note: Policy regarding use of State Emergency Relief (SER) funds administered by county FIA offices does not apply to these funds.

POLICY:

Funding Period

The funding period will be January 1, 2003 through July 31, 2003. All unexpended funds will lapse at the end of the funding period.

Allocation of Funds

Funds are allocated using a base of $6300, with the balance based on the CAA's relative percentage of households in the state at or below 150% of poverty.

- CAA allocations are shown in Attachment A.

Agreement Instructions

The MPSC Agreement must be signed by the person having lawful authority to bind the Grantee to its terms. The signature must be witnessed. Return both originals of the signed, dated and witnessed Agreement to your grant manager at:

Family Independence Agency
Community Services and Special Projects
PO Box 30037
Grand Tower, Suite 1314
Lansing, MI 48909

The MPSC Agreement, in conjunction with the Master Agreement, will constitute the full contractual agreement between FIA and the CAA for administration of MPSC funds.

Eligibility Requirements

Eligible households must meet 200% of poverty income requirements based on U.S. Department of Health and Human Services poverty guidelines. See CSPM Item 1001, Income Eligibility Guidelines, for poverty guidelines and definitions of income.

A household is automatically income-eligible for MPSC funds in the following instances:

- The local FIA office has determined the household to be income-eligible for the SER program in the last 30 days.
- The household is currently receiving Family Independence Program (FIP) assistance.

A household does not have to be denied SER assistance by the local FIA office in order to be eligible. Agencies **cannot** require documentation of a denial for assistance from FIA or any other service agency as a condition of eligibility.

CAAs may use MPSC funds to pay for emergency energy assistance for eligible households that have been denied SER benefits by the local FIA office. They may also use MPSC funds to assist households in becoming eligible for SER by assisting the household with missed required payments or co-pays. MPSC funds may also be used for households whose emergency needs exceed SER payment maximums.

Coordination

The use of these funds should be coordinated with local agencies, to the extent possible, by prior discussion with them on the CAA's proposed use of funds and target population(s). Coordination should include, to the extent feasible, procedures which foster maximum participation by eligible persons who are in need, and minimize duplication of services.

Financial Management

The CAA may set a maximum amount per emergency service and a maximum amount per household.

The CAA may spend funds directly or subcontract them.

Cost Category Limitations

Allowable administrative costs are limited to wages and fringe benefits for administration of this MPSC fund.

Administrative expenses may not exceed 10% of the CAA's allocation.

Allowable Emergency Services

The chart, Item 308 - Attachment B, contains the allowable emergency services and the required demonstration of need for each. Anything not included in this list is not allowed.

Demonstration of need must be documented in the client file for each time and each type of service provided.

Reporting Requirements

Activity Report

Each agency must complete, and submit quarterly, the MPSC Programmatic and Narrative Report (FIA-440). See Item 1002 for reporting instructions.

Billing and Financial Reporting

Report monthly expenditures on the FIA-3469, Statement of Expenditures.

- Submit one original and two copies of the FIA-3469, no later than 30 days after the report month, to:

  Family Independence Agency
  Community Services and Special Projects
  PO Box 30037
  Grand Tower, Suite 1314
  Lansing, MI 48909

Initial Payment

An advance of 25% will be processed for payment to the CAA upon completion of FIA processing of the MPSC Agreement. A copy of the signed agreement will be returned to the CAA. Subsequent payments in response to the FIA-3469 will be reduced to recover the advance.

FISCAL YEAR 2003 MPSC Energy Efficiency Funds

For Period: January 1, 2003 through September 30, 2003

Fund Allocation Chart

(Based on Percent of Households with Income Level at or below 150% of Poverty Level)

AGENCY	Base Funding	150% of Poverty	Percent of Poverty Allocation	TOTAL ALLOCATION
ACSET-CAA	6,300	4.12	54,013	60,313
Alger-Marquette CAB	6,300	1.03	13,503	19,803
Allegan County RDC	6,300	0.77	10,095	16,395
Baraga-Houghton-Keweenaw	6,300	0.90	11,799	18,099
CAA of South Central MI	6,300	3.26	42,739	49,039
Capital Area Community Ser	6,300	4.91	64,370	70,670
Chippewa-Luce-Mackinac	6,300	0.77	10,095	16,395
Community Action Agency	6,300	2.82	36,970	43,270
Detroit - Dept of Human Ser	6,300	21.40	280,554	286,854
Dickinson-Iron CSA	6,300	0.64	8,390	14,690
EOC of St. Clair County	6,300	1.48	19,403	25,703
Eight CAP, Inc.	6,300	2.52	33,037	39,337
Five CAP, Inc.	6,300	1.57	20,583	26,883
Genesee County CAA	6,300	5.27	69,090	75,390
Gogebic-Ontonagon CAA	6,300	0.49	6,424	12,724
Human Dev Commission	6,300	2.21	28,973	35,273
Kalamazoo County HDB	6,300	2.43	31,857	38,157
Macomb County CSA	6,300	4.24	55,586	61,886
Menominee-Delta-School	6,300	1.10	14,421	20,721
Mid Michigan CAA	6,300	3.94	51,653	57,953
Monroe Co Opportunity	6,300	1.06	13,897	20,197
Muskegon-Oceana CAAP	6,300	2.38	31,202	37,502
Northeast Michigan CSA	6,300	2.99	39,199	45,499
Northwest Michigan HSA	6,300	2.86	37,495	43,795
Oakland-Livingston HSA	6,300	6.60	86,526	92,826
Ottawa County CAA	6,300	1.03	13,503	19,803
Saginaw County CAC	6,300	2.79	36,577	42,877
Southwest Michigan CAA	6,300	3.47	45,492	51,792
Washtenaw Co ETCS Group	6,300	2.55	33,431	39,731
Wayne Metro CAA	6,300	8.40	110,124	116,424
TOTALS	$ 189,000	100.00	$ 1,311,000	$ 1,500,000

J:\CSPM\MPSC\FY02 MPSC Allocations - 03-01-02.xls

	DRAFT	
	with	
	additional info	
# of households from PY94 State Plan	% of total households	Advance 10%
30,164	0.0412	6,031
7,544	0.0103	1,980
5,623	0.0077	1,639
6,560	0.0090	1,810
23,819	0.0326	4,904
35,913	0.0491	7,067
5,607	0.0077	1,639
20,623	0.0282	4,327
156,542	0.2140	28,685
4,714	0.0064	1,469
10,843	0.0148	2,570
18,467	0.0252	3,934
11,458	0.0157	2,688
38,572	0.0527	7,539
3,582	0.0049	1,272
16,203	0.0221	3,527
17,782	0.0243	3,816
31,024	0.0424	6,189
8,019	0.0110	2,072
28,835	0.0394	5,795
7,740	0.0106	2,020
17,431	0.0238	3,750
21,880	0.0299	4,550
20,906	0.0286	4,379
48,259	0.0660	9,283
7,522	0.0103	1,980
20,420	0.0279	4,288
25,356	0.0347	5,179
18,683	0.0255	3,973
61,517	0.0841	11,642
731,608	1.00	$150,000
The following numbers have been corrected: CAA of SCentral is 23,819 not 23,319 and Ottawa is 7,522 not 7,552.		

MICHIGAN PUBLIC SERVICE COMMISSION FUNDS

ALLOWABLE EMERGENCY SERVICES & DEMONSTRATION OF NEED

Following is the list of **allowable** emergency services and the **required** demonstration of need for each.
N**OTE:** Demonstration of Need **must** be documented in the client file for each time and each type of service provided.

ALLOWABLE SERVICES	DEMONSTRATION OF NEED
Heat & Utility Services:	
• Heat • Electric • Water or Cooking Gas • Deposits • Fees for Connection, Reconnection or Hookups	Actual or threatened shutoff: by written notice or telephone call to utility company with worker notes in client file Cooking gas & deliverable fuel: client statement Fees for Connection, Reconnection or Hookups: Fee schedule or phone contact with utility provider

PURPOSE:

To provide CAAs with instructions regarding administration of Low Income Home Energy Assistance Program: Crisis Assistance (LCA) funds

BACKGROUND:

The State of Michigan, Family Independence Agency, is distributing $3.0 million in Low Income Home Energy Assistance Program funds to CAAs for emergency energy assistance. These funds are allocated to CAAs to enable them to provide emergency energy assistance to low-income households. The use of these funds should be coordinated with other area emergency service providers.

POLICY:

Funding Period

The funding period will be April 1, 2003 through September 30, 2003. All unexpended funds will lapse at the end of the funding period.

Allocation of Funds

Funds are allocated using a base of $6300, with the balance based on the CAA's relative percentage of households in the state at or below 150% of poverty.

- CAA allocations are shown in Attachment A.

Agreement Instructions

The LCA Agreement must be signed by the person having lawful authority to bind the Grantee to its terms. The signature must be witnessed. Return both originals of the signed, dated and witnessed Agreement to your grant manager at:

Family Independence Agency
Community Services and Special Projects
PO Box 30037
Grand Tower, Suite 1314
Lansing, MI 48909

The LCA Agreement, in conjunction with the Master Agreement, will constitute the full contractual agreement between FIA and the CAA for administration of LCA funds.

Eligibility Requirements

Eligible households must meet 150% of poverty income requirements based on U.S. Department of Health and Human Services poverty guidelines. See CSPM Item 1101, Income Eligibility Guidelines, for poverty guidelines and definitions of income.

A household is automatically income-eligible for LCA funds in the following instances:

- The local FIA office has determined the household to be income-eligible for the SER program in the last 30 days.
- The household is currently receiving Family Independence Program (FIP) assistance.

A household does not have to be denied SER assistance by the local FIA office in order to be eligible. Agencies **cannot** require documentation of a denial for assistance from FIA or any other service agency as a condition of eligibility.

CAAs may use LCA funds to pay for emergency energy assistance for eligible households that have been denied SER benefits by the local FIA office. They may also use LCA funds to assist households in becoming eligible for SER by assisting the household with missed required payments or co-pays. LCA funds may also be used for households whose emergency needs exceed SER payment maximums.

Coordination

The use of these funds should be coordinated with local agencies, to the extent possible, by prior discussion with them on the CAA's proposed use of funds and target population(s). Coordination should include, to the extent feasible, procedures which foster maximum participation by eligible persons who are in need, and minimize duplication of services.

Financial Management

The CAA may set a maximum amount per emergency service and a maximum amount per household.

The CAA may spend funds directly or subcontract them.

Cost Category Limitations

Allowable administrative costs are limited to wages and fringe benefits for administration of this LCA fund.

Administrative expenses may not exceed 10% of the CAA's allocation.

Allowable Emergency Services

The chart, Item 309 - Attachment B, contains the allowable emergency services and the required demonstration of need for each. Anything not included in this list is not allowed.

Demonstration of need must be documented in the client file for each time and each type of service provided.

Reporting Requirements

Activity Report

Each agency must complete, and submit quarterly, the LCA Programmatic and Narrative Report (FIA-440). See Item 1102 for reporting instructions.

Billing and Financial Reporting

Report monthly expenditures on the FIA-3469, Statement of Expenditures.

- Submit one original and two copies of the FIA-3469, no later than 30 days after the report month, to:

  Family Independence Agency
  Community Services and Special Projects
  PO Box 30037
  Grand Tower, Suite 1314
  Lansing, MI 48909

Initial Payment

An advance of 25% will be processed for payment to the CAA upon completion of FIA processing of the LCA Agreement. A copy of the signed agreement will be returned to the CAA. Subsequent payments in response to the FIA-3469 will be reduced to recover the advance.