

CSPMs 301-302  
for CSBG and CSBD  
have been moved  
to the 500 Series

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Community Services Policy Manual	SUBJECT: Allocations and Plan Instructions  <b>DEPARTMENT OF ENERGY (DOE) WEATHERIZATION ASSISTANCE PROGRAM (WAP)</b>		EFFECTIVE DATE 07/01/2017  ISSUE DATE 6/28/17

## REFERENCES

- Department of Energy Weatherization Program Notice 17-1

## PURPOSE

The Michigan Department of Health & Human Services (MDHHS) is allocating Department of Energy (DOE) funds, based on the DOE Weatherization Program Notice information. If applicable, Carryover funds will be distributed to Grantees at a later date, if applicable.

## POLICY

LWOs are to prepare and submit the Weatherization Assistance Program (WAP) Service Plan in accordance with the following directions.

## DOE WAP SERVICE PLAN INSTRUCTIONS

### I. SUBMISSION OF PLAN

A. The plan must include the following in order:

#### 1. DOE WAP SERVICE PLAN

Mandatory plan attachments include:

- Grantee Organizational Chart reflecting all positions budgeted to the Weatherization program should be uploaded into FACSPRO.
- Subcontractor agreements if \$25,000 or above.
- Updated Standard Accord form should be uploaded into FACSPRO.

#### 2. DOE Electronic Budget, Attachment B

- Include the Equipment Waiver form, if applicable.
- If using an Indirect Cost Rate, the most current approved rate letter must be uploaded into FACSPRO.
- Weatherization Unit Production Schedule and County Unit Production Schedule (now part of the budget- tab 1)

B. Grantees are to submit the Service Plan electronically to the MDHHS-BCAEO@michigan.gov mailbox by the required due date of **June 6, 2017**.

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## II. ALLOCATION - FUNDS

The BCAEO WAP allocation chart BCAEO shows DOE WAP Grantee allocations. Funding is based upon the availability of federal resources.

DOE expects 100% production and 100% expenditure of all funds. In response, the MI DOE state plan indicates that DHHS retains the right to modify funding allocations for Grantees not meeting production and expenditure projections. To ensure MI meet these expectations, BCAEO will regularly review production and expenditures using the Statement of Expenditures and Programmatic reports submitted.

BCAEO will survey local agencies in the first half of the program year to ascertain whether or not each Grantee can meet the projected production. Any Grantee not expecting to spend funds or not meet the projected production as indicated on the Production Schedule submitted with their DOE plan, will be contacted to discuss their allocation.

## III. PROGRAM PERIOD

Grantees are to plan budgets for the 12 month period from July 1 through June 30.

## IV. ALLOWABLE EXPENDITURES

Grantees will develop plans using the expenditure and program guidelines in this package. Allowable expenditures by budget category are located in the Community Service Policy Manual (CSPM) Item 402.2, DOE Cost Categories.

## V. FISCAL REPORTING

**Expenditure Reports:** The Statement of Expenditures will be used in accordance with the CSPM Item 401.2. Receipt and approval of the monthly report will permit reimbursement payments (minus recoupment of a portion of the initial advance, if any).

## VI. VEHICLES

Both DHHS and DOE must approve purchases prior to taking any action to purchase and/or lease vehicles. Agencies must complete the DHS-551 for all equipment purchase and/or vehicle lease requests.

## VII. GOALS SUMMARY

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The client goals are as follows:

Families with Children: Grantees may determine goal (percentage) based on data for their service area.

Elderly households: Grantees may determine goal (percentage) based on data for their service area.

Disabled households: Grantees may determine goal (percentage) based on data for their service area.

High Residential Energy User: See CSPM Item 611.

High Energy Burden: Households that pay 20% or more of their total household income toward annual energy costs.

## VIII. LIABILITY INSURANCE

Grantees 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.

LWOs are advised to verify that the Grantee insurance policies to make sure policies do not contain a clause that prohibits work in homes with lead-based paint.

Effective PY09, DOE no longer requires Pollution Occurrence Insurance (POI), but still strongly recommends POI. Liability insurance, including POI, must be charged to the Liability Insurance line item in the budget. If an LWO chooses NOT to hold POI coverage and damage occurs because of not following all aspects of Lead Safe Weatherization or there is disturbance to any other environmental pollutants, the cost to do remediation, clean up, relocation, medical expenses or any other resulting costs may not be charged to the contract and must be covered by another funding mechanism.

## IX. SERVICE PLAN

The DOE WAP Service Plan, Attachment A, must include the following elements:

A completed DOE WAP Service Plan. The plan includes a summary narrative which provides a description of the major aspects of the methods of program operation. Complete Sections I – V and include all requested attachments.

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### Section I: Agency Information

Grantees must provide the service areas the agency provides WAP services to and a list of all agency sites where program services are offered.

### Section II: Program Operations

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

### Section III: Basic Service Delivery Mechanism & Program Structure

Grantees must demonstrate compliance and effectiveness with delivery of services and program structure including intake process, delivery of services, and WAP training.

### Section IV: Other Program Information

Grantees must demonstrate compliance and effectiveness with other program requirements and processes.

### Section V: Equipment Purchase Requirements

List any equipment items you are requesting to purchase. Complete and attach the DHS-551, Equipment Purchase Request, for all equipment purchases and any vehicle purchase/lease request.

### Section VI: Budget Narrative

Grantees must ensure that all budget requirements match narrative information and meet state and federal policy.