

Community Services Policy Manual

1200 Series

MEAP Policy

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REFERENCES

- [CSPM 900 Series](#)
- [Michigan Energy Assistance Program Request for Proposal](#)
- [Michigan Energy Assistance Program Policy and Procedure Manual](#)
- [State Emergency Relief ERM 201, 205, 206](#)
- [LIHEAP Clearinghouse](#)
- [Understanding LIHEAP Assurance 16](#)
- [State and Territories' Use of Assurance 16](#)

MEAP Program Overview

According to the [2020 Home Energy Affordability Gap](#) report from Fisher, Sheehan & Colton: 900,577 households in Michigan fall below the 150% Federal Poverty Level (FPL). In 2020, fewer than 400,000 of these households received energy assistance services from one or more of the following programs: MEAP, State Emergency Relief, and/or the Home Heating Credit.

MEAP will assist in the resolution of energy crisis situations and work with eligible households to develop an energy security plan that will enable participants to become or move toward energy security.

An energy security plan includes assisting participants with the following: paying their energy bills on time; budgeting for and contributing to their ability to provide for energy expenses, which may include enrollment into an affordable payment plan (APP); and utilizing energy services to optimize on energy efficiency.

During fiscal years 2022-2023, emphasis will be placed on comprehensive appraisal, holistic services, meaningful referral, tiered outcomes, and accurate data reporting and analytics. Success will include a customer-focused orientation, a commitment to understanding and serving whole families through a customer-focused lens, a willingness to understand and capture well-defined metrics of success, and a philosophy of partnership and stakeholder engagement.

MEAP Objectives

1. Provide support to households in applying for energy crisis assistance through the State Emergency Relief (SER) program.

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2. Through a common needs assessment, align customer need with an appropriate energy security plan for each household.
3. Provide resources and services, including vendor advocacy, energy use education, financial counseling and/or case management to qualifying households that will enable participants to become or move toward energy security. The household's self-sufficiency/energy security plan can incorporate direct payment assistance, including payments for customers enrolled in affordable payment plans.
4. Promote the coordination of energy assistance funding streams.
5. Result in a convenient, customer-friendly system for distribution of energy assistance.
6. Encourage innovation through pilot projects that target underserved households or special populations (e.g., low/fixed income, higher than average energy usage, non-metered fuel use).

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1201 – INCOME ELIGIBILITY GUIDELINES

ELIGIBILITY REQUIREMENTS

Households will be determined eligible based on the State Emergency Relief application process.

Households who present with an energy crisis will initially apply for the State Emergency Relief (SER) program, either directly with MDHHS or with assistance from a CAA MI Bridges Navigator, and MDHHS will determine eligibility for LIHEAP assistance through SER. SER applicants will be eligible to receive self-sufficiency services, including case management through MEAP grantees. Households who qualify for SER energy services will be eligible for MEAP direct payment assistance, including enrollment into an affordable payment plan. A household must receive an SER payment for each commodity for which the CAA is providing support during that fiscal year. Eligibility for SER qualifies a household for MEAP services for the entire fiscal year.

Note: If a customer has a combined electric and natural gas account and is approved for only one commodity/service, the household will be considered MEAP eligible for both service types.

Note: A household that applies for SER in September but is approved for SER and seeks assistance from a MEAP Grantee during the valid 30-day SER period in October would be considered eligible during that fiscal year.

Note: If a CAA is assisting with an allowable SER co-pay by DHHS, the CAA must notify MDHHS of the guarantee of payment. Once the grantee has verified the MEAP assistance for the co-pay, the SER payment will be authorized. Send verifications for the clients to the DHHS Central FAX # 517-346-9888.

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1202 – APPLICATION PROCESSING

CLIENT FILE

Agencies must maintain a client file for all recipients of MEAP funds which must be uploaded to FACSPRO. At a minimum, the file must include documents used to verify identity, residency, and income, including:

- The MEAP Energy Security Plan and any check lists or other documentation used by the CAA to ensure that all required client information is gathered, documented, and retained in the client file. The Plan must include:
 - Full name of the client and all members of the household
 - MDHHS Case Number for household
 - Address
 - City and Zip Code
 - County
 - The client and the intake worker's signatures
- Document that verifies SER eligibility and FPL if the household is being enrolled in an APP. Documents may be originals or copies of the original document. Facsimiles are acceptable documents. Acceptable proof of SER eligibility includes DHS-1419 SER Decision Notice, Navigator screen print of SER eligibility, or documentation of collateral contact with MDHHS which must include date, signature of the agency representative, along with the name of the MDHHS staff person who provided the information. Additionally, a note indicating the week that the SER data file was accessed on Salesforce will be acceptable. *Note: The "Dates Covered" must include a starting date equal to 10/1/2022 or later. The DHS 509 does not include this date and should not be used, especially at the start of the new fiscal year.*
- For direct energy assists, document the energy type and dollar amount of assistance, and retain a copy of the utility bill or estimate for deliverable fuel (LP Gas/Propane, Fuel Oil, and Coal), wood or other non-traditional fuel. If the address on the utility bill is different than the address of the client, an explanation must be included in the client file. If the name on the utility bill is different than the client's name, an explanation must be included in the client file.

When assistance is provided for a deliverable fuel, the CAA must obtain a copy of the service invoice prior to issuing payment. Approval should be based on an estimate provided by the service provider. The amount issued to the provider cannot exceed the estimated amount which was used for the eligibility determination. Retain a copy of the invoice which documents the amount of

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deliverable fuel provided and the amount of the deliverable fuel in the tank prior to delivery. If the fuel tank capacity was above 25% at the time of delivery, no MEAP payment should be made.

- Document Assurance 16 activities:
 - Needs assessment and referral information
 - Financial education activities
 - Energy education activities
 - Vendor advocacy
 - Long or short-term case management plan (if applicable)
 - Energy waste reduction services through home energy supplier programs

The documents must contain a date on which the activity occurred, what the activity included, and documentation of that activity on paper or in the CAA's database.

- Has the household received MEAP assistance since October 1? If yes, document information for the prior services including the date, assistance amount, Assurance 16 activities, home energy supplier, and MEAP Grantee that provided the assistance. Previous MEAP assistance can be located in the [MPSC Salesforce Portal](#).
- FACSPRO Customer Report
- Copy of Award from Award Pro
- Completed Action Plan report generated from FACSPRO.

Notice of Eligibility/Eligibility Determination Letters

A notice of eligibility should be given to all applicants notifying whether the application was approved or denied. If the application is approved, the notice should include any contributions the household must make to resolve the emergency. If the application is denied, the notice should include the reason for denial. All eligibility notices must include information on how to request a review of denial.

Agencies may have a generic letter available that should be given to clients upon determination. A copy of the letter is not required as part of the file documentation.

All applicants should be made aware of the agency appeals process. If an applicant appeals a denial, the agency must inform the BCAEO Grant Manager within five days. BCAEO will then inform MPSC. MPSC will review all appeals and assist in the appeal process with the agency.

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APPEAL PROCESS

Agencies shall establish a procedure by which applicants wishing to contest an eligibility decision or the timeliness of such a decision. All applicants should be made aware of the agency appeals process. If a MEAP applicant appeals a denial, the agency must inform the BCAEO Grant Manager within two days. BCAEO will then inform MPSC. MPSC will review all appeals and assist in the appeal process with the agency.

COORDINATION

MEAP grantees are expected to coordinate availability of MEAP low-income energy assistance with other services currently provided as well as with other grantees/agencies that provide energy assistance, weatherization, and education focused on reducing energy consumption.

TEN DAY STANDARD OF PROMPTNESS

Agencies shall observe a 10-day standard of promptness in the process of eligibility determination and benefit issuance for complete and timely filed applications.

DATA CONFIDENTIALITY (PERSONALLY IDENTIFIABLE INFORMATION (PII) AND PERSONAL HEALTH INFORMATION (PHI))

CAAs must keep and maintain data in strict confidence, using such a degree of care as is appropriate and consistent with policy to avoid unauthorized access, use, disclosure, or loss. CAAs are responsible for maintaining a backup of the data and for an orderly and timely recovery of such data. CAAs must notify their grant managers immediately in the event of any act, error, or omission, negligence, misconduct, or breach that compromises data security.

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1203 – PROGRAM REQUIREMENTS

MEAP funds may be used for the crisis season, which begins on November 1 and ends May 31 each year. **Not more than 30% of the funds received for the program shall be spent on services accrued outside of the crisis season.**

CAA Responsibilities:

- CAAs must be listed in Michigan’s 211 profile and partner with MDHHS to become a Navigator/Referral Partner in MI Bridges to assist clients with the SER application and verify benefits as applicable.
- Implement the standardized MEAP Energy Security Plan with each household.
- Utilize the standardized needs assessment tool with each household.
- Participate in program evaluation efforts based on similar customer cohorts.
- Coordinate availability of this low-income energy assistance program with other program services currently provided by the selected applicant (e.g. financial or energy education, other wrap-around self-sufficiency services).
- Coordinate availability of this low-income energy assistance program with other grantees/ agencies to provide energy crisis prevention programs, weatherization, and education focused on reducing energy consumption.
- Provide referrals if CAA is not able to assist low-income households due to exhausting MEAP crisis funds before the end of the grant cycle.
- Coordinate availability of this low-income energy assistance program with home energy suppliers. Coordinate energy assistance payments with energy suppliers, municipal owned utilities, cooperatives, distributors of deliverable fuels, and other energy assistance providers to more efficiently serve the needs of low-income households.
- Payments for deliverable fuels must not be released until the service has been provided and an invoice has been received. The invoice must contain the date service was provided, cost of service and the provider must also confirm that the residential fuel tank did not contain more than 25% of its heating fuel capacity at the time of delivery. Households who heat with wood must confirm delivery of product prior to payment being released or the Grantee must receive an invoice for delivery from the provider.

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- SER Co-Payment
 - If a client has a co-payment that results from an alien proration co-pay, MEAP funds cannot be used to assist with that amount.
 - If a client has a co-payment that results from an amount that is over SER cap, MEAP funds can be used to assist with that amount. The household must complete a MEAP Energy Security Plan in order to receive a direct assistance payment through MEAP.
 - Enrollment in an affordable payment plan is sufficient “proof” of co-payment for households with an asset, shortfall and/or over cap co-payment requirement. The Proof of Affordable Payment Plan enrollment for SER copay form must be used to notify DHHS of the client’s enrollment in an APP in lieu of making a co-payment.
 - For direct energy payments, ensure the general household cap for MEAP is not exceeded. MEAP allows for payment of up to \$2,500 for each qualifying household during the grant period. However, households with a balance exceeding \$2,500 should not be automatically denied. Assistance payments that will cause the household to exceed \$2,500 must be approved by the BCAEO. Energy assistance payments issued through SER do not count toward the household’s MEAP cap.
 - To request an exception to the MEAP cap, complete the MEAP Over-cap Exception Request spreadsheet (available on the [MEAP Resource Library](#)) and submit via email to MDHHS-BCAEO@michigan.gov.
 - Prioritize enrollment in home energy supplier affordable payment plans as an option for qualifying households. Applicants must work with each home energy supplier that has an ongoing affordable payment plan. If the Affordable Payment Plan structure is not followed by an energy supplier, notify BCAEO of non-compliance.
 - The CAA that enrolls a customer in an Affordable Payment Plan will be responsible for that customer’s APP payments as long as the customer remains on the APP.
 - Ensure that direct energy payments are released only to eligible home energy suppliers. All home energy suppliers must be registered in the State of Michigan’s SIGMA Vendor Self- Service System (VSS) (www.michigan.gov/VSSLogin) and be enrolled as an eligible supplier by MDHHS.
 - Ensure that any customer of a non-participating or “opt-out” provider who seeks MEAP assistance prior to April 1 will not be considered eligible for services. Eligibility for applications submitted on or after April 1 will be considered as they are

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protected from shut off for nonpayment of a delinquent account between November 1 and April 15 as outlined in PA 95 of 2013.

- Encourage potentially eligible households (at or below 110% FPL) to pursue the availability of the Home Heating Credit. Applications for the [Home Heating Credit](#) can be filed from January 1 through September 30 of each year.
- Issue a 1099-Misc Form to each vendor (provider) who received \$600 or more in MEAP funds, see ‘Specific Instructions.’ State of Michigan’s guide for 1099 Reporting and IRS Instructions for the 1099-MISC. Customer satisfaction surveys are encouraged but not required.

Energy Assistance Definitions and Dates

- “Crisis” means one of the following: 1) an individual or recipient has received a past due notice on an energy bill for his or her household (a shut off or disconnect notice is not required); 2) a residential fuel tank is estimated to contain no more than 25% of its heating fuel capacity; 3) a stated need for deliverable fuel or a nontraditional fuel source in which there is no meter or regular energy bill provided; or 4) a notice that the balance in a prepayment account is below a minimum amount.
- “Crisis season” refers to the period from November 1 through May 31 each year. Not more than 30% of the funds awarded for energy assistance programs through MEAP shall be spent on home energy costs accrued outside the “crisis season.”
- “Eligible low-income household” means a household with an income of not more than 150% of the Federal Poverty Guidelines.
- “Federal Poverty Guidelines” means the poverty guidelines published annually in the federal register by the United States Department of Health and Human Services under its authority to revise the poverty line under section 673(2) of subtitle B of title VI of the Omnibus Budget Reconciliation Act of 1981, 42 USC 9902. See the 2023 Federal Poverty Guidelines that will be in effect for the 2023 grant year October 1st through September 30th.

Self-Sufficiency Definitions & Services

The CAA shall include services that will enable participants to become or move toward becoming self-sufficient, including assisting participants in paying their energy bills on time, assisting participants in budgeting for and contributing to their ability to provide for energy expenses, and assisting participants in utilizing energy services to optimize on energy waste reduction.

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Households receiving MEAP assistance must receive additional energy security services that could include:

- Needs assessment, which means reviewing the client’s case record and identifying the most appropriate services and referrals
- Vendor Advocacy, which means helping the client to communicate effectively with the vendor to maintain service and includes enrollment in an APP.
- Affordable payment plan, which means a program that provides a household with a more affordable energy payment for an established period of time and includes a component for arrearage forgiveness when necessary
- Financial education (or budget conversation), which means to provide financial counseling, financial literacy education, and/or financial management training to assist a household in budgeting for and contributing to their ability to provide for energy expenses.
- Energy education (or conservation conversation), which means assisting households to develop a better understanding of their energy bill and developing strategies to motivate a household to make behavioral changes to decrease their usage. This includes furnishing information to households about how to reduce energy usage and obtain energy waste reduction services.
- Energy waste reduction services through home energy supplier programs, which means energy conservation or energy efficiency services that are demonstrated to produce measurable savings to help a household to achieve a greater degree of energy self-sufficiency
- Weatherization through the U.S. Department of Energy Weatherization assistance Program and/or LIHEAP.
- Short term case management, which means developing information and materials about services available to MEAP clients, developing an understanding of a client’s needs, and offering counseling during MEAP intake
- Longer term case management, which means developing a curriculum and training materials for service delivery, working with clients on energy education and/or financial counseling over an extended time period.

Affordable Payment Plan Criteria

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In addition to general MEAP eligibility criteria, households must meet other eligibility criteria for enrollment in an Affordable Payment Plan. Consumption/Usage and customer account balance criteria vary by utility company.

Households with income below 20% FPL should not generally be considered for Affordable Payment Plan enrollment, but grantees can allow enrollment on an exception basis or as part of an approved pilot program.

If a household reports income to a MEAP grantee but is listed at 0% income on the SER FPL list the grantee should email the MDHHS-MEAP mailbox with case information to receive clarification and confirm actual zero income.

If a household presents to a MEAP grantee with income that is newly acquired since the SER eligibility period, the grantee can document in the client file the details of the employment including the name of the employer, the name of the household member with the income and the start date and proceed with the APP enrollment.

Beginning FY2024, APPs utilizing MEAP funds must follow the outlined parameters and be approved by the MPSC.

Re-establishing Eligibility (Multiple Assists)

SER eligibility determinations for energy services can be used for the fiscal/program year.

Eligibility verification for households enrolled in home energy supplier affordable payment plans is valid for the term of the program while the customer maintains timely payments.

Households that enrolled in home energy supplier affordable payment plans in FY 2021 or FY 2022 and have not defaulted from the program (or have not completed the 24-month term, as applicable) will be considered re-enrolled for FY 2023. Households may not exceed 24 consecutive months on an affordable payment plan.

Unallowable Services

MEAP funds are not to be used for the following:

- Regulated utility/energy provider late fees
- Charges for opting out of AMI/Smart Meter programs
- Optional services such as appliance repair or appliance protection programs

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- Bankrupt accounts
 - In some cases, bankruptcy may be listed on the customer’s account in ORA or CE Pass for historical purposes. Please confirm with the energy provider whether or not the bankruptcy status is still current. Exception: If the utility provider knows the dollar amount that is NOT subject to the bankruptcy, and that dollar amount that is not subject to the bankruptcy would resolve the emergency for the next 30 days payment could be made if all other eligibility requirements have been met, and if the client would not exceed the cap.
- Cooking gas
- Service used in businesses or nonresidential buildings or facilities such as rental units, garages, stores, or nonresidential farm uses. When a bill represents combined residential and nonresidential or business usage, pay only the residential portion if the utility can provide an approximate breakdown showing the residential use portion and the group applying for energy services pays the nonresidential costs. In the case of a client who works in their own home, if the bill is in the client’s name and the service address is the same as the client’s residence address, it is considered a residential bill and payment may be authorized. If the bill is in the name of the client’s business, it is considered a commercial bill and payment cannot be authorized
- Common meter/service situations. This occurs when one meter or heat/electric unit services more than one residential unit or residence. If the energy provider can verify the group’s actual usage and the provider will accept the household’s portion and maintain services, payment may be made in full.
- Payments to residential landlords, residential management companies, billing service agencies, or collection agencies are not eligible to receive emergency service or MEAP funds, as they are not the actual service provider
 Exception: Accounts that have gone to collections can be paid if the collections department is one within the original utility provider, for example DTE’s collections department. If the account has been turned over to an outside collection agency, then the bill is not able to be paid with MEAP funds.
 Exception: Utility bills that are in the landlord’s name only if the payment is made directly to the utility, and if there is documentation stating that the client is responsible for the utility bill.
- Energy services when the usage is in violation of the federal law
 Example: A client has requested assistance for an electric shut off which includes costs associated to manufacturing “medical” marijuana. The client is not eligible for MEAP since federal law, 21 U.S.C. 841(a) prohibits the manufacturing of marijuana

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- Secondary household fuel types and cooking gas: Payment may only be approved for the primary heating source
- Utility cut and cap fees/meter relocation fees
- If a CAA authorizes deliverable fuel services and the provider discovers the client's tank is over 25%, MEAP funds may not be used to cover any costs incurred

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1204 – PROGRAMMATIC REPORTING

POLICY

The CAA is required to have all required information in FACSPRO (or other preapproved system) for the reporting periods listed below, by the Report Due Date listed below. BCAEO will extract the report for each agency from FACSPRO each month and transfer it to the MPSC Salesforce Portal. CAAs can also generate their own programmatic reports from FACSPRO for each report period. Each reporting period, CAAs must verify that the information in FACSPRO is correct, complete, and consistent with the CAA's monthly Statement of Expenditure.

Note: CAAs are required to enter all data in real-time to ensure up-to-date reporting.

Monthly Report Data and Documentation

BCAEO will submit monthly reports to MPSC based on the information in FACSPRO. The report requires CAAs to use Award Pro and fully complete Action Plans (one Action Plan per household). BCAEO will also extract the following:

- individual customer names, address, county
- date of birth
- MDHHS case numbers
- households receiving an energy security plan and Assurance 16 services
- the additional program(s) the agency enrolled the customer in to meet the bundled services approach
- individual demographics including poverty level
- a list of vendors that were paid and account numbers
- the amount paid to each vendor
- program year and date of assistance

CAAs providing Assurance 16 services must be able to report the impact of activities through FACSPRO:

1. Total number of households assisted
2. Total number of households achieving self-sufficiency

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3. Total number of households able to reduce dependency on LIHEAP
4. Total number of households denied MEAP benefits

Reporting Schedule

The CAA must have all information in FACSPRO by the deadlines in the table below. Detailed instructions for completion of Action Plans and AwardPro can be found in the [BCAEO – MEAP FACSPRO Guide](#).

MEAP 2023 Reporting Schedule (Year Two)

Report Due Date	Report Type	FSR #	Period Covered
November 21, 2022	FACSPRO Action Plans: All households assisted FACSPRO AwardPro: All households assisted	1	October 1 - October 31, 2022
November 27, 2022	SOE and FSR		
December 23, 2022	FACSPRO Action Plans: All households assisted FACSPRO AwardPro: All households assisted	2	November 1 - November 30, 2022
December 30, 2023	SOE and FSR		
January 23, 2023	FACSPRO Action Plans: All households assisted FACSPRO AwardPro: All households assisted	3	December 1 - December 31, 2022
January 27, 2023	SOE and FSR		
February 21, 2023	FACSPRO Action Plans: All households assisted FACSPRO AwardPro: All households assisted	4	January 1 - January 31, 2023
February 24, 2023	SOE and FSR		
March 24, 2023	FACSPRO Action Plans: All households assisted FACSPRO AwardPro: All households assisted	5	February 1 - February 28, 2023
March 28, 2023	SOE and FSR		
April 24, 2023	FACSPRO Action Plans: All households assisted FACSPRO AwardPro: All households assisted	6	March 1 - March 31, 2023
April 28, 2023	SOE and FSR		
May 1, 2023	Interim Project Status Report		October 1, 2022 - March 31, 2023
May 23, 2023	FACSPRO Action Plans: All households assisted FACSPRO AwardPro: All households assisted	7	April 1 - April 30, 2023
May 29, 2023	SOE and FSR		
June 23, 2023	FACSPRO Action Plans: All households assisted FACSPRO AwardPro: All households assisted		

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June 27, 2023	SOE and FSR	8	May 1 - May 31, 2023
July 24, 2023	FACSPRO Action Plans: All households assisted FACSPRO AwardPro: All households assisted	9	June 1 - June 30, 2023
July 28, 2023	SOE and FSR		
August 23, 2023	FACSPRO Action Plans: All households assisted FACSPRO AwardPro: All households assisted	10	July 1 - July 31, 2023
August 28, 2023	SOE and FSR		
September 22, 2023	FACSPRO Action Plans: All households assisted FACSPRO AwardPro: All households assisted	11	August 1 - August 31, 2023
September 29, 2023	SOE and FSR		
October 8, 2023	FACSPRO Action Plans: All households assisted FACSPRO AwardPro: All households assisted	12	September 1 - September 30, 2023
October 13, 2023	SOE and FSR		
October 15, 2023	Interim Project Status Report		October 1, 2022 - September 30, 2023

Interim Project Status Reports

CAAs must submit Interim Narrative Reports and a Final Project Report to BCAEO by the due dates identified in the Reporting Schedule. Narrative reports should be submitted via email to MDHHS-BCAEO@michigan.gov and include the following:

- **Project Progress**
Brief outline of the work accomplished during the reporting period and the work to be completed during the subsequent reporting period(s).
- **Assurance 16**
 - Describe how you have used LIHEAP funds to provide Assurance 16 services.
 - Describe the impact of Assurance 16 activities on households served.
 - Describe the level of direct benefits provided to those households.
- **Noteworthy Accomplishments**
Identify and describe any milestones reached or noteworthy accomplishments completed during the period.

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- **Delays**

Brief description of problems or delays, real or anticipated, which should be brought to the attention of the BCAEO.

- **Coordinated Efforts**

Describe any coordinated efforts with other organizations related to MEAP implementation

- **Project Impacts**

Describe impacts, anticipated and/or unanticipated, experienced as a result of MEAP implementation

- **Evaluation**

Evaluate the success of the program. Provide an honest and objective assessment of the successes and failures of the project. The evaluation should have both quantitative and qualitative components. Provide the results from your customer satisfaction survey (if applicable).

- **Attachments and Other Materials**

Provide project materials developed and implemented during the reporting period (e.g. newspaper articles, newspaper advertisements, forms, brochures, announcements, studies, reports, analyses, audits, etc.).

BCAEO will submit aggregated statewide reports that will include:

- **Project Identification**

Name of selected applicant grant number and dates of current reporting period.

- **Project Milestones**

Percent (%) completion of the project objectives based on number of households served and amount of energy assistance funding spent.

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- **Project Progress**

Brief outline of the work accomplished during the reporting period and the work to be completed during the subsequent reporting period(s).

- **Assurance 16**

- Describe how you have used LIHEAP funds to provide Assurance 16 services.
- Describe the impact of Assurance 16 activities on households served.
- Describe the level of direct benefits provided to those households.

- **Household Metrics**

- Number of unduplicated households that presented for MEAP Assurance 16 services
- Number of unduplicated households that received MEAP Assurance 16 services

- **Noteworthy Accomplishments**

Identify and describe any milestones reached or noteworthy accomplishments completed during the period.

- **Delays**

Brief description of problems or delays, real or anticipated, which should be brought to the attention of the Grant Administrator.

- **Project Deviations**

Statement concerning any significant deviation from the previously agreed-upon work plan developed in Part V: Information Required from Applicant.

- **Attachments and Other Materials**

Provide project materials developed and implemented during the reporting period (e.g. newspaper articles, newspaper advertisements, forms, brochures, announcements, studies, reports, analyses, audits, etc.).

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BCAEO will submit aggregated statewide reports as well as reports on the administration of the statewide MEAP grant.

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1205 – PROGRAM BUDGET

Disallowed Costs

Disallowed costs include but are not limited to the following:

- bonuses
- overtime
- tuition reimbursement/remission
- vehicle allowance
- seminars
- conferences
- meetings
- subscriptions
- dues
- memberships

Administrative Costs

Administrative costs cover expenses related to general administrative functions and coordination of functions and oversight related to MEAP administrative functions. Administrative costs should include costs of goods and services required for administrative functions of the program, such as:

- Travel costs incurred for official business in carrying out administrative activities or the overall management of the MEAP
- Costs of information systems related to administrative functions; and contractual services related to sub-recipients or vendors that are solely for the performance of administrative functions.

Total administrative and indirect costs included in the budget may not exceed 8% of the total grant award.

Energy Assistance Program (EAP) Costs

EAP costs cover expenses related to the delivery of energy assistance program services. EAP costs should include Program Costs, Assurance 16 Program Costs and Direct Energy

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Assistance Payments.

Assurance 16 Program Costs

Assurance 16 (A16) funding covers expenses directly related to the delivery of energy assistance self-sufficiency activities offered by the Michigan Energy Assistance Program. Self-sufficiency activities must include services that will enable participants to become or move toward becoming self-sufficient.

Allowable Assurance 16 activities can include the following:

- Needs Assessment - In-depth review of the client's status to assess the need for other services.
- Referrals - Development of referral database and identification of relevant referrals for individual clients.
- Crisis Management/Vendor Advocacy - Working with clients in crisis to identify the resources needed to restore energy services and/or advocating on behalf of those clients with energy vendors.
- Financial Counseling - Furnishing longer-term counseling services to try to prevent future energy-related crises.
- Energy Education and Advocacy - Helping clients to understand how reduce energy usage and how to gain access to energy efficiency programs.

Energy Education activities may include, but are not limited to:

- Energy kits
- Mileage and/or a specifically designated vehicles for transportation to and from a household or other community areas or facilities to perform allowable Assurance 16 activities and/or installation of Energy Kits.
- Purchase and maintenance of energy education trailers and/or homes used to provide hands on exhibits that teach participants cost-effective energy reduction strategized used to optimize energy efficiency including, but not limited to how to caulk windows, install door sweeps, and change furnace filters. The homes may also be used to demonstrate high efficiency

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appliances, insulation applications, and other measures used for Weatherization.

- Development and instruction of energy education exhibits, videos, hands on instructional prompts and material.
- Incentive benefits to households for attendance at energy education classes.
- Case Management - Ongoing work with clients to ensure that they had their energy service restored and to ensure that they are able to access additional services for which they are eligible.
 - Short Term
 - Developing information and materials about services available to LIHEAP clients. This may include printing and postage costs for Assurance 16 materials and information.
 - Developing an understanding of a client's needs and offering counseling during LIHEAP intake.
 - Providing blankets, hats, and fans to households.
 - Long Term
 - Developing a curriculum and training materials for service delivery
 - Working with clients on energy education and/or financial counseling over an extended time period
- Direct staff time spent on the activities listed above.

Examples of expenditures that are **not** allowable A16 expenditures include:

- Assurance 16 funds may not be used in coordination with the Community Services Block Grant.
- Outreach – Designing outreach materials, conducting outreach activities
- Intake – Working with the client to complete the LIHEAP application
- Crisis Determination – Assessing whether the client is in crisis
- Benefit Determination – Using the information supplied by the client to determine their benefit
- Office space, desks, equipment, supplies (administrative)

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- Non-LIHEAP personnel referring people for energy assistance. For instance, a Head Start employee who spends time assessing client needs and decides the household needs energy assistance is doing Head Start referral activities, not Assurance 16.
- Indirect costs, human resources, IT support
- Staff time spent when a caller inquiries about programs available to assist their family. It is not an Assurance 16 activity to determine that a household should apply for energy assistance. That is considered a shared administrative cost with other programs.
- Heat or crisis benefits
- Weatherization or home repair
- Leveraging activities
- Other expenses listed as unallowable for federal awards in 45 CFR 75, unless it is specifically listed here as allowable.

Assurance 16 activities should be included as separate items within the budget. Only expenditures for the portion of staff members' time spent on Assurance 16 activities may be charged under the Assurance 16 Program Costs budget category.

Program Costs cover other expenses related to the delivery of energy assistance program services.

Budget Requirements

The budget shall display three (3) headings identified as the: Line Item, Budget Category, and Total. The budget line items that need to be included, at a minimum, are listed below. The budget should reflect the best estimate of actual costs using whole numbers.

Personnel

Salary – in the budget, include the name and job title for each staff position to be paid for by the grant. Time sheets and payroll registers must be submitted for each staff position, and hours worked must be grant related.

Fringe Benefits – fringe benefits may not exceed 35% of each employee's salary. Fringe benefits will be reimbursed based on actual expenditures per employee up to 35%, not on budgeted amounts. Allowable benefits include: health, dental, and optical insurance, employer-paid Social Security and Medicare tax, Michigan and Federal unemployment

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tax, and other miscellaneous fringe benefits (life insurance, long- and short-term disability insurance, worker’s compensation, and retirement program contributions up to 4%). Applicants must provide details on the organization’s method of calculating fringe benefit expenses that will be charged to the grant including whether fringe benefits are calculated on an annualized basis or based on the length of the grant term.

The budget narrative must include the number of weeks the individual will work on the grant; number of hours per week a full time employee of the organization is expected to work; a description of the work to be performed by each individual; the estimated hours to be worked; actual pay rate; the fringe benefit percentage being charged to the grant for each employee; the percentage of the employee’s time allocated to the grant; whether each employee is salaried-exempt, salaried-non- exempt or hourly; and any other applicable information related to the individual’s duties and responsibilities in connection with this grant.

Individuals that are not on selected applicant’s payroll, e.g., independent contractors, individuals receiving a Form 1099, temporary workers, etc., must be placed under the Contractual Services budget category. Only employees on the selected applicant’s payroll should be included in the Personnel budget category.

Supplies, Materials, & Equipment

Specify item(s) and cost. The budget narrative should include the anticipated cost of each item, a detailed explanation of the item’s purpose, and how it relates to the project being funded. Be as detailed as possible.

Contractual Services:

Contractual Services must be competitively bid. Individuals that are not on selected applicant’s payroll, e.g., independent contractors, individuals receiving a Form 1099, temporary workers, etc., must be placed under Contractual Services. When competitive selection is not feasible or practical, the selected applicant agrees to obtain the written approval of the Grant Administrator before making a sole source selection. The CAA must provide a copy of contracts, memoranda of understanding or agreements signed by selected applicant and contractors.

The CAA assumes responsibility to select subcontractors on a competitive basis. A minimum of three bids must be solicited and proposals must include, at a minimum: (1) name of selected applicant, grant number, and grant period; and (2) the type, number, and description of projects as described in the proposal.

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The CAA must provide the Grant Manager with the solicitation, list of vendor responses (including amounts), and name of the selected vendor. The CAA must maintain bids on file at their place of business. The Grant Manager will reserve the right to request a copy of all bids for services that are competitively bid.

Awards must go to the lowest bid unless the Grant Manager has given prior written approval for selection of a higher bid, written justification for the selection of a higher bid must also be retained on file at the CAA's place of business. When awarding subcontracts, the CAA must ensure that preference is given to products manufactured in or services offered by Michigan-based firms.

Travel

CAAs will be only be reimbursed for travel expenses included in the budget and service plan at State of Michigan Standardized Travel Regulations The State will reimburse for mileage, lodging, and meals, refer to the current State travel rates. Meals and lodging must be supported by itemized, legible receipts and reasons for travel. Itemized meal receipts must include a list of each item purchased; receipts for payments made by credit card that are not itemized will not be accepted.

Mileage must be supported by travel log(s) with beginning and ending addresses, mileage total, and reason for travel. CAAs will be provided a travel log example. Out-of-state travel must be directly related to the grant project and approved by the Grant Administrator prior to travel. Travel expenses listed in the travel budget category are strictly for individuals listed on the budget under Personnel. Per Diem payments and alcoholic beverage reimbursements are not allowed.

Other Expenses

This category is solely for use by organizations charging a per-case fee for work performed by subunits or internal agencies within the organization that do not require a competitive bid, i.e. contract, memorandum of understanding or any other type of signed agreement.

Energy Assistance Program Costs

The budget category is solely for costs incurred for delivery of energy assistance program services.

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Direct Energy Assistance Payments at a minimum indicate the approximate number of households to be assisted and the estimated average payment.

Indirect Costs

Indirect costs are costs not directly or specifically related to the grant program. Indirect costs are costs of administering the organization and must be spread over a number of products, services, or grant programs in proportion to the benefit received. Examples include office supplies and equipment, utilities, rent, maintenance and repair, insurance, accounting and bookkeeping services, and legal services. Non-cash expenses like depreciation, amortization, and depletion are not allowable indirect costs under this grant.

The CAA will be reimbursed for its proportional share of indirect costs. This means MEAP should be allocated its proportionate share of the indirect costs and not 100% of the organization's total indirect cost. The indirect cost methodology should be included in the budget. The budget should contain a list of indirect costs, how the CAA determined its indirect costs, and the percentage rate calculation for reimbursable indirect costs.

Total direct program costs included in the budget must be at least 92% of the total grant award. Note: As allowed by PA 615 of 2012, an entity may, upon approval from the department, use less than 92% but not less than 90% of the funds received for the program for energy assistance.

If a CAA has received a notice of de-designation, the CAA is not eligible for supplemental funding programs, including MEAP.