OMB Number: 4040-0004
Expiration Date: 03/31/2029

APPLICATION FOR FEDERAL ASSISTANCE SF-424 Version 02

1. Type of Submission:
- [ ] Preapplication
- [x] Application
- [ ] Changed/Corrected Application

2. Type of Application:
- [ ] New
- [ ] Continuation
- [X] Revision

If Revision, select appropriate letter(s)
Increase Duration

Other (specify):

3. Date Received
02/10/2025

4. Applicant Identifier:

5a. Federal Entity Identifier:

5b. Federal Award Identifier:
DE-SE0001817

State Use Only:

6. Date Received by State:

7. State Application Identifier:

8. APPLICANT INFORMATION:

a. Legal Name: Georgia Environmental Finance Authority

b. Employer/Taxpayer Identification Number (EIN/TIN):
581667498

c. UEI:
RWEWFEXCBZK6

d. Address:

Street 1: 47 Trinity Ave SW
Street 2: Fifth Floor
City: Atlanta
County: FULTON County
State: GA
Province:
Country: U.S.A.
Zip / Postal Code: 303340000

e. Organizational Unit:

Department Name:

Division Name:
Energy Resources Division

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

Prefix: Mr
First Name: Kristofor
Middle Name:
Last Name: Anderson
Suffix:

Title: Director of Energy Resources

Organizational Affiliation: Georgia Environmental Finance Authority

Telephone Number: 4045841031
Fax Number: 4045841008

Email: kanderson@gefa.ga.gov

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OMB Number: 4040-0004
Expiration Date: 03/31/2029

APPLICATION FOR FEDERAL ASSISTANCE SF-424 Version 02

9. Type of Applicant:

A State Government

10. Name of Federal Agency:

U. S. Department of Energy

11. Catalog of Federal Domestic Assistance Number:

81.042

CFDA Title:

Weatherization Assistance Program

12. Funding Opportunity Number:

DE-WAP-0002026

Title:

2026 Weatherization Assistance Program (WAP) Funding

13. Competition Identification Number:

Title:

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

State of Georgia

15. Descriptive Title of Applicant's Project:

The Weatherization Assistance Program enables low-income families to reduce their energy bills by making their homes more energy efficient . During the last 40 years, the U.S. Department of Energy's (DOE) Weatherization Assistance Program has provided weatherization services to millions of low-income families.

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OMB Number: 4040-0004
Expiration Date: 03/31/2029

APPLICATION FOR FEDERAL ASSISTANCE SF-424

Version 02

16.Congressional District Of:

a. Applicant: Georgia Congressional District 05

b. Program/Project: GA-Statewide

Attach an additional list of Program/Project Congressional Districts if needed:

17. Proposed Project:

a. Start Date: 07/01/2026

b. End Date: 06/30/2027

18. Estimated Funding ($):

a. Federal	6,419,489.00
b. Applicant	0.00
c. State	0.00
d. Local	0.00
e. Other	0.00
f. Program Income	0.00
g. TOTAL	6,419,489.00

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

☐ a. This application was made available to the State under the Executive Order 12372 Process for review

☐ b. Program is subject to E.O. 12372 but has not been selected by the State for review.

☒ c. Program is not covered by E.O. 12372

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

No

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

☐ I AGREE

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

Authorized Representative:

Prefix:

First Name: Trey

Middle Name:

Last Name: Bennett

Suffix:

Title: Executive Director

Telephone Number: 4045841003

Fax Number:

Email: tbennett@gefa.ga.gov

Signature of Authorized Representative:

Date Signed:

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BUDGET JUSTIFICATION FOR FORMULA GRANTS

Applicant: Georgia Environmental Finance Authority
Award number: SE0001817

Budget period: 07/01/2026 - 06/30/2027

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

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

Position	Description of Duties of Professionals
Division director - energy	Oversight of energy resources division, which includes the state energy program, state facilities program, state fuel storage tank program, and the weatherization assistance program. Approves grant level management decisions and provides guidance to program manager and subordinate staff.
Program manager	Perform administrative support for the WAP. Prepares contracts and amendments, maintains files, enters budgets and data. Provides technical assistance regarding program policy, state approvals, reviews payment invoices and prepares invoices for payment. Collects and maintains documentation of subgrantee insurance, contractor insurance, contractor licenses and training documents. Updates internal IGEFA reporting and is primary point of contact for Hancock related issues.
Lead program manager	Provides management of the administrative, monitoring, training and technical assistance functions of the Georgia WAP. Develops and delivers the state plan, budget and required documents. Conducts the public hearing and policy advisory council reviews. Works with WAP team to maintain and update training plans and health and safety plans. Performs monthly desk monitoring, tracks spend and production, recommends reallocation of funds when required. Performs programmatic monitoring on all agencies and pre-procurement approvals. Review of contracts, amendments, invoices. Attends national conferences. Presents on monthly T&TA call. Presents WAP updates at bimonthly Georgia Community Action Agencies board meetings. Works with WAP team and other resources to develop a training agenda and host the WAP annual training conference. Responsible for state approvals as required in the policy and procedures manual.
Program manager/monitor	Manage the training and on-site monitoring activities for the weatherization program. Monitors the WAP at the subgrantee level; provides technical assistance to management in issues regarding standard work specifications, program waivers; inspection procedures and technical guidance. Visits subgrantee agencies; inspects 10 percent of completed units and monitors compliance with operations procedure, tracks program activities, tracks resolution of monitoring findings, and assists in program reporting. Responsible for maintaining updated training and technical documents. Reviews all combustion safety and quality control inspection reports monthly. Updates internal IGEFA reporting on all above.

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Project Manager	Perform administrative support for the WAP. Prepares contracts and amendments, maintains files, enters budgets and data. Provides technical assistance regarding program policy, state approvals, reviews payment invoices and prepares invoices for payment. Collects and maintains documentation of subgrantee insurance, contractor insurance, contractor licenses and training documents. Updates internal IGEFA reporting and is primary point of contact for Hancock related issues.

Direct Personnel Compensation:

Position	Salary/Rate	Time	Direct Pay
Division director - energy	$138,020.00	15.0706 % FT	$20,800.44
Program manager	$72,000.00	35.6700 % FT	$25,682.40
Lead program manager	$108,150.00	25.7688 % FT	$27,868.96
Program manager/monitor	$100,940.00	35.6199 % FT	$35,954.73
Project Manager	$100,940.00	35.6701 % FT	$36,005.40
		Direct Pay Total	$146,311.93

2. FRINGE BENEFITS

a. Are the fringe cost rates approved by a Federal Agency? If so, identify the agency and date of latest rate agreement or audit below, and attach a copy of the rate agreement to the application.

b. If a. above does not apply, please use this box (or an attachment) to further explain how your total fringe benefits costs were calculated. Your calculations should identify all rates used, along with the base they were applied to (and how the base was derived), and a total for each (along with grand total). If there is an established computation methodology approved for state-wide use, please provide a copy. Also, please fill out the table below with the Fringe Benefits Calculations.
FICA – 7.65%
Health insurance – 30.454%
Retirement – 23.5463% to 23.547% (blended plan rates, i.e. new plan vs. GSEPS)
The fringe rates are determined and set by the state with the exception of FICA, which is a federal rate of 7.65 percent. All fringe rates are computed at the state level and are determined based on an actuarial calculation for pensions and amounts needed to cover basic health costs and OPEB (other post-employment benefit) amounts. However, we must use their rates as we pay into the state's health and retirement funds.
.

Fringe Benefits Calculations

Position	Direct Pay	Rate	Benefits
Division director - energy	$20,800.44	63.6260 %	$13,234.49
Program manager	$25,682.40	63.6323 %	$16,342.30
Lead program manager	$27,868.96	63.6323 %	$17,733.66
Program manager/monitor	$35,954.73	63.6367 %	$22,880.40
Project Manager	$36,005.40	63.6365 %	$22,912.58
		Fringe Benefits Total	$93,103.43

3. TRAVEL

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

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Purpose of Trip	Number of Trips	Cost Per Trip	Total
Program Managers, Lead Program Manager, Energy Director to attend Weatherization Conferences such as NASEO, NCAP, NASCSP etc.	18	$2,505.00	$45,090.00
Senior program manager and program monitor; and energy director attend BPI, NPHC or similar type conferences.	5	$2,505.00	$12,525.00
Program manager to perform program monitoring visit on each subgrantee at $679 per visit.	14	$679.00	$9,506.00
Technical Monitor and Lead Program Manager to attend conferences such as National Home Performance and Trade Show and Energy Outwest	4	$2,505.00	$10,020.00
Program monitor to perform required QCI on 10% of completed units.	14	$679.00	$9,506.00
		Travel Total	$86,647.00

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

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We are using past trips of similar nature to compute cost for monitoring around the state and conference attendance.
PY2026 Travel Justification:
NASCSP Conferences
Air Fare
$700.00
Hotel @ $250/day X 5 days
$1250
Per Diem @ $71/day X 5 days
$355
Transportation
$200
Total per Trip
$2,505
Number of Trips = 27
$67635
State QCI Monitoring and T&TA
Rental & Mileage
$239
Hotel @ $189/day *2
$378
Per Diem @ $31/day
$62
*Based on two-day visit
$679
Number of Trips = 14
$9506
State Program Monitoring
Rental & Mileage
$239
Hotel @ $189/day *2
$378
Per Diem @ $31/day
$62
*Based on two-day visit
$679
Number of Trips = 14
$9506
Total Travel Budget
$86,647

4. EQUIPMENT - Equipment is generally defined as an item with an acquisition cost greater than $10,000 and a useful life expectancy of more than one year.

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

Equipment	Unit Cost	Number	Total Cost	Justification of Need

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

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5. SUPPLIES - Supplies are generally defined as an item with an acquisition cost of $10,000 or less and a useful life expectancy of less than one year. Supplies are generally consumed during the project performance.

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

General Category	Cost	Justification of Need

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

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

Name of Proposed Sub	Total Cost	Basis of Cost*
Subgrantee	$74,000.00	Subgrantee contracts - Liability insurance allocation based on prior spend
Subgrantee Program Operation	$2,632,419.00	Subgrantee contracts - Program operations based on allocation formula. MLPS for agencies.
Subgrantee TTA	$310,300.00	Subgrantee contracts - Subgrantee T&TA for network training & travel cost based on allocation formula
Leverage funds	$64,194.00	will add disc
Subgrantee H&S	$975,680.00	Subgrantee contracts - Health & safety cost based on allocation formula
Weatherization Readiness Fund	$506,752.00	To prepare otherwise deferred homes for weatherization assistance.
Subgrantee ADMIN	$439,056.00	Subgrantee contracts - Administrative cost based on allocation formula
Subgrantee Final Inspection	$133,450.00	New budget category to offset the ACPU
Subgrantee Intake and Eligibility	$133,450.00	New budget category to offset the ACPU
Subgrantee Energy Audits	$133,450.00	New budget category to offset the ACPU.
Contracts and Subgrants Total	$5,402,751.00	

*For example, Competitive, Historical, Quote, Catalog

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

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

General Description	Cost	Justification of Need
Everblue Pre Apprenticeship Program	$140,000.00	The pre-apprenticeship combines hybrid learning—including online modules and in-person instruction—with real-world On-the-Job Training. Participants complete courses such as Weatherization 101, BPI Building Science Principles, OSHA 10, Asbestos Awareness, Lead Renovator and Customer Service for Energy Professionals, gaining the knowledge and credentials needed to begin meaningful careers in weatherization.

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Electronic Management and Reporting System	$90,000.00	Annual maintenance and support fees for electronic management and reporting system utilized by the WAP network. Cost basis: contractual agreement with vendor. Cost is based on last year's proposal from the vendor. .
Real Estate Rental 47 Trinity Ave	$11,172.00	Grantee real estate rentals - allocated staff ratio
Registration	$29,971.00	Registrations for conferences, i.e. NASCSP (Mid-winter and fall); NCAP (Mid-winter and fall) GCAA, NASEO, Energy Outwest, Home Performance Annual Conference
Technical Monitoring	$36,000.00	Costs associated with hiring a contractor to assist with grantee technical monitoring
Annual Training for Network	$160,370.00	Annual training for WAP network conference. Including New web based weatherization training provided by Everblue
Other Direct Costs Total	$467,513.00	

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

The Georgia Weatherization Assistance Program (WAP) Annual Network Conference is hosted by GEFA to facilitate training, policy communication and planning within the WAP network. Mandatory attendance by all participating subgrantees is required.

Real Estate Rental: The weatherization program cost share for housing at GEFA facilities.

Real estate rentals are allocated on a FTE basis. The portion of the budget for real estate rentals is based on projected charges as of the FTEs allocated to WAP for total employees currently on staff. Fluctuations exist as employee levels change throughout the year. Allocated across WAP leveraged fund sources.

All costs proposed are only being used in support of WAP

All costs included in Other Direct Costs are properly excluded from indirect costs to ensure there are no duplicate charges.

8. INDIRECT COSTS

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

GEFA's EPA approved fixed rate agreement of 150 percent expires 06/30/2026. GEFA will adjust the applied rate based on the final indirect cost rate approval. GEFA has applied for an updated indirect cost rate plan and is currently awaiting approval from DOE.

In the past, GEFA has charged less than the approved rate because not all grants provide the necessary funding in administrative dollars to cover full cost recovery. Certain programs such as the Weatherization Assistance Program, have five percent limitations on administrative funds at the grantee level which prohibits the state from collecting its total indirect cost base.

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

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

Name: Jammie Harden Phone Number: 4045841015

Indirect costs calculations:

Indirect Cost Account	Direct Total	Indirect Rate	Total Indirect
Grantee Admin	$146,313.00	84.9951 %	$124,358.88
Grantee T&TA	$116,223.03	85.0125 %	$98,804.10
		Indirect Costs Total	$223,162.98

OMB Number: 4040-0006
Expiration Date: 06/30/2028

BUDGET INFORMATION - Non-Construction Programs

1. Program/Project Identification No. SE0001817	2. Program/Project Title Weatherization Assistance Program	
3. Name and Address	Georgia Environmental Finance Authority 47 Trinity Ave SW Atlanta, GA 303340000	4. Program/Project Start Date 07/01/2026 5. Completion Date 06/30/2027

SECTION A - BUDGET SUMMARY

Grant Program Function or Activity (a)	Federal Catalog No. (b)	Estimated Unobligated Funds		New or Revised Budget		
		Federal (c)	Non-Federal (d)	Federal (e)	Non-Federal (f)	Total (g)
1. DOE 2026_2027 WAP FORMULA FUNDS	81.042	$ 0.00		$ 6,419,489.00		$ 6,419,489.00
2.						
3.						
4.						
5. TOTAL		$ 0.00	$ 0.00	$ 6,419,489.00	$ 0.00	$ 6,419,489.00

SECTION B - BUDGET CATEGORIES

6. Object Class Categories	Grant Program, Function or Activity				Total
	(1) GRANTEE ADMINISTRATION	(2) SUBGRANTEE ADMINISTRATION	(3) GRANTEE T&TA	(4) SUBGRANTEE T&TA	(5)
a. Personnel	$ 51,209.00	$ 0.00	$ 95,103.00	$ 0.00	$ 146,312.00
b. Fringe Benefits	$ 32,586.00	$ 0.00	$ 60,517.00	$ 0.00	$ 93,103.00
c. Travel	$ 0.00	$ 0.00	$ 86,647.00	$ 0.00	$ 86,647.00
d. Equipment	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
e. Supplies	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
f. Contract	$ 0.00	$ 439,056.00	$ 0.00	$ 310,300.00	$ 5,402,751.00
g. Construction	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
h. Other Direct Costs	$ 84,550.00	$ 0.00	$ 382,963.00	$ 0.00	$ 467,513.00
i. Total Direct Charges	$ 168,345.00	$ 439,056.00	$ 625,230.00	$ 310,300.00	$ 6,196,326.00
j. Indirect Costs	$ 124,359.00	$ 0.00	$ 98,804.00	$ 0.00	$ 223,163.00
k. Totals	$ 292,704.00	$ 439,056.00	$ 724,034.00	$ 310,300.00	$ 6,419,489.00
7. Program Income	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00

OMB Number: 4040-0006
Expiration Date: 06/30/2028

BUDGET INFORMATION - Non-Construction Programs

1. Program/Project Identification No. SE0001817	2. Program/Project Title Weatherization Assistance Program	
3. Name and Address	Georgia Environmental Finance Authority 47 Trinity Ave SW Atlanta, GA 303340000	4. Program/Project Start Date 07/01/2026 5. Completion Date 06/30/2027

SECTION A - BUDGET SUMMARY

Grant Program Function or Activity (a)	Federal Catalog No. (b)	Estimated Unobligated Funds		New or Revised Budget		
		Federal (c)	Non-Federal (d)	Federal (e)	Non-Federal (f)	Total (g)
1.						
2.						
3.						
4.						
5. TOTAL		$ 0.00	$ 0.00	$ 6,419,489.00	$ 0.00	$ 6,419,489.00

SECTION B - BUDGET CATEGORIES

6. Object Class Categories	Grant Program, Function or Activity				Total
	(1) PROGRAM OPERATIONS	(2) HEALTH AND SAFETY	(3) VEHICLES AND EQUIPMENT	(4) LIABILITY INSURANCE	(5)
a. Personnel	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 146,312.00
b. Fringe Benefits	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 93,103.00
c. Travel	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 86,647.00
d. Equipment	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
e. Supplies	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
f. Contract	$ 2,632,419.00	$ 975,680.00	$ 0.00	$ 74,000.00	$ 5,402,751.00
g. Construction	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
h. Other Direct Costs	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 467,513.00
i. Total Direct Charges	$ 2,632,419.00	$ 975,680.00	$ 0.00	$ 74,000.00	$ 6,196,326.00
j. Indirect Costs	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 223,163.00
k. Totals	$ 2,632,419.00	$ 975,680.00	$ 0.00	$ 74,000.00	$ 6,419,489.00
7. Program Income	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00

OMB Number: 4040-0006
Expiration Date: 06/30/2028

BUDGET INFORMATION - Non-Construction Programs

1. Program/Project Identification No. SE0001817	2. Program/Project Title Weatherization Assistance Program	
3. Name and Address	Georgia Environmental Finance Authority 47 Trinity Ave SW Atlanta, GA 303340000	4. Program/Project Start Date 07/01/2026 5. Completion Date 06/30/2027

SECTION A - BUDGET SUMMARY

Grant Program Function or Activity (a)	Federal Catalog No. (b)	Estimated Unobligated Funds		New or Revised Budget		
		Federal (c)	Non-Federal (d)	Federal (e)	Non-Federal (f)	Total (g)
1.						
2.						
3.						
4.						
5. TOTAL		$ 0.00	$ 0.00	$ 6,419,489.00	$ 0.00	$ 6,419,489.00

SECTION B - BUDGET CATEGORIES

6. Object Class Categories	Grant Program, Function or Activity				Total
	(1) WEATHERIZATION READINESS	(2) INTAKE/ELIGIBILITY	(3) FINAL INSPECTION	(4) ENERGY AUDITS	(5)
a. Personnel	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 146,312.00
b. Fringe Benefits	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 93,103.00
c. Travel	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 86,647.00
d. Equipment	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
e. Supplies	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
f. Contract	$ 506,752.00	$ 133,450.00	$ 133,450.00	$ 133,450.00	$ 5,402,751.00
g. Construction	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00
h. Other Direct Costs	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 467,513.00
i. Total Direct Charges	$ 506,752.00	$ 133,450.00	$ 133,450.00	$ 133,450.00	$ 6,196,326.00
j. Indirect Costs	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 223,163.00
k. Totals	$ 506,752.00	$ 133,450.00	$ 133,450.00	$ 133,450.00	$ 6,419,489.00
7. Program Income	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00

OMB Number: 4040-0006
Expiration Date: 06/30/2028

BUDGET INFORMATION - Non-Construction Programs

1. Program/Project Identification No. SE0001817	2. Program/Project Title Weatherization Assistance Program	
3. Name and Address	Georgia Environmental Finance Authority 47 Trinity Ave SW Atlanta, GA 303340000	4. Program/Project Start Date 07/01/2026 5. Completion Date 06/30/2027

SECTION A - BUDGET SUMMARY

Grant Program Function or Activity (a)	Federal Catalog No. (b)	Estimated Unobligated Funds		New or Revised Budget		
		Federal (c)	Non-Federal (d)	Federal (e)	Non-Federal (f)	Total (g)
1.						
2.						
3.						
4.						
5. TOTAL		$ 0.00	$ 0.00	$ 6,419,489.00	$ 0.00	$ 6,419,489.00

SECTION B - BUDGET CATEGORIES

6. Object Class Categories	Grant Program, Function or Activity				Total
	(1) LEVERAGING	(2)	(3)	(4)	(5)
a. Personnel	$ 0.00				$ 146,312.00
b. Fringe Benefits	$ 0.00				$ 93,103.00
c. Travel	$ 0.00				$ 86,647.00
d. Equipment	$ 0.00				$ 0.00
e. Supplies	$ 0.00				$ 0.00
f. Contract	$ 64,194.00				$ 5,402,751.00
g. Construction	$ 0.00				$ 0.00
h. Other Direct Costs	$ 0.00				$ 467,513.00
i. Total Direct Charges	$ 64,194.00				$ 6,196,326.00
j. Indirect Costs	$ 0.00				$ 223,163.00
k. Totals	$ 64,194.00				$ 6,419,489.00
7. Program Income	$ 0.00				$ 0.00

U.S. Department of Energy

WEATHERIZATION ASSISTANCE PROGRAM
SUBGRANTEE INFORMATION
State: GA Grant Number: SE0001817 Program Year: 2026

Name: **action pact**

Address: 510 Tebeau St
P. O. Box 1965
Waycross, GA 31502-0000

Contact: Diane Rogers
UEI: XNGLXNC6LLJ1
DUNS: 118277433
Phone: (912) 285-6173
Fax: (912) 285-6285
Email: drogers@myactionpact.org

Counties served:
JEFF DAVIS County
BRANTLEY County
COFFEE County
WARE County
PIERCE County
EFFINGHAM County
BACON County
CHATHAM County
CLINCH County
BULLOCH County
TATTNALL County
TOOMBS County
CHARLTON County
CANDLER County
WAYNE County
ATKINSON County
APPLING County
EVANS County

Tentative allocation: $ 514,626.31
Planned units: 29
Type of organization: Non-profit organization

Congressional districts served:

CD
GA-01
GA-12

Source of labor: Agency and Contractors

Name: **Area Committee To Improve Opportunities Now Inc.**

Address: 2440 W Broad St
Ste 15
Athens, GA 30606-0000

Contact: Lisa Gautreaux
UEI: EH59W82NLKH7
DUNS: 075872218
Phone: (706) 546-8293
Fax: (706) 546-9180
Email: lgautreaux@actionincorporated.org

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U.S. Department of Energy

WEATHERIZATION ASSISTANCE PROGRAM
SUBGRANTEE INFORMATION
State: GA Grant Number: SE0001817 Program Year: 2026

Counties served: ROCKDALE County, JACKSON County, OCONEE County, MORGAN County, MADISON County, GWINNETT County, NEWTON County, OGLETHORPE County, DEKALB County, GREENE County, ELBERT County, WALTON County, CLARKE County, BARROW County

Tentative allocation: $ 1,029,965.40
Planned units: 57
Type of organization: Non-profit organization

Congressional districts served:

CD
GA-06
GA-13
GA-03
GA-10
GA-04
GA-07
GA-08
GA-05

Source of labor: Contractors

Name: **Central Savannah River Area Economic Opportunity Inc.**

Address: 1261 Greene St
Augusta, GA 30901-0000

Contact: Mary Harrison
UEI: SEQLNHAX6KZ3
DUNS: 092148261
Phone: (706) 722-0493
Fax: (706) 945-1627
Email: mharrison@csraeoa.org

Counties served: JENKINS County, BURKE County, MCDUFFIE County, EMANUEL County, COLUMBIA County, WARREN County, RICHMOND County, TALIAFERRO County, SCREVEN County, JEFFERSON County, LINCOLN County, GLASCOCK County, WILKES County

Tentative allocation: $ 324,014.20
Planned units: 18
Type of organization: Non-profit organization

Congressional districts served:

CD
GA-12
GA-10

Source of labor: Contractors

Name: **Clayton County Community Services Authority Inc.**

Address: 1000 Main St
Forest Park, GA 30297-0000

Contact: Eme Isok Nsuk
UEI: NEHRNF1QXLM5
DUNS: 088940424
Phone: (678) 904-9715
Fax: (404) 368-3951
Email: eisoknsuk@claytoncountycsa.org

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U.S. Department of Energy

WEATHERIZATION ASSISTANCE PROGRAM
SUBGRANTEE INFORMATION
State: GA Grant Number: SE0001817 Program Year: 2026

Counties served: CLAYTON County, FAYETTE County, HENRY County

Tentative allocation: $ 286,029.08
Planned units: 16
Type of organization: Non-profit organization
Source of labor: Agency and Contractors

Congressional districts served:	CD
	GA-03
	GA-05
	GA-13

Name: **Coastal Georgia Area Community Action Authority Inc.**

Address: 2801 Community Action Dr
Brunswick, GA 31520-0000

Contact: Tres Hamilton
UEI: PB71GPMH99Z5
DUNS: 010775872
Phone: (912) 264-3281
Fax: (912) 265-7444
Email: thamilton@coastalgacaa.org

Counties served: GLYNN County, MCINTOSH County, BRYAN County, CAMDEN County, LIBERTY County, LONG County

Tentative allocation: $ 177,105.19
Planned units: 10
Type of organization: Non-profit organization
Source of labor: Agency and Contractors

Congressional districts served:	CD
	GA-01

Name: **Coastal Plain Area Economic Opportunity Authority Inc.**

Address: 1810 W Hill Ave
Unit A-6
Valdosta, GA 31601-0000

Contact: Tanya Thomas
UEI: SZFZRFME2W18
DUNS: 069197200
Phone: (229) 244-7860
Fax: (229) 245-7885
Email: tthomas@coastalplain.org

Counties served: COOK County, BEN HILL County, BERRIEN County, LANIER County, BROOKS County, TURNER County, LOWNDES County, IRWIN County, TIFT County, ECHOLS County

Tentative allocation: $ 216,406.59
Planned units: 12
Type of organization: Non-profit organization
Source of labor: Agency and Contractors

Congressional districts served:	CD
	GA-01
	GA-08
	GA-02

Name: **Community Action for Improvement Inc.**

Address: 1380 LaFayette Pkwy
LaGrange, GA 30241-0000

Contact: Jennifer Corcione
UEI: FWDLC2EWB6Z3
DUNS: 166674655
Phone: (706) 884-2651
Fax: (706) 884-2654
Email: jcorcione@cafi-ga.org

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U.S. Department of Energy

WEATHERIZATION ASSISTANCE PROGRAM
SUBGRANTEE INFORMATION
State: GA Grant Number: SE0001817 Program Year: 2026

Counties served: COWETA County, MERIWETHER County, HEARD County, CARROLL County, DOUGLAS County, HARRIS County, TROUP County, MUSCOGEE County

Tentative allocation: $ 368,241.50
Planned units: 21
Type of organization: Non-profit organization

Congressional districts served:

CD
GA-03
GA-13
GA-02
GA-11

Source of labor: Agency and Contractors

Name: **Middle Georgia Community Action Agency Inc.**

Address: 121 Prince St
P.O. Box 2286
Warner Robins, GA 31099-0000

Contact: Tammy Sosebee
UEI: D6VKTJ1YB3A8
DUNS: 072483258
Phone: (478) 922-4464
Fax: (478) 922-7320
Email: tsosebee@mgcaa.org

Counties served: JONES County, TELFAIR County, DODGE County, BUTTS County, HOUSTON County, MONTGOMERY County, WHEELER County, CRAWFORD County, UPSON County, SPALDING County, BLECKLEY County, BIBB County, TREUTLEN County, LAMAR County, LAURENS County, WILCOX County, MONROE County, PEACH County, PIKE County, PULASKI County, TWIGGS County

Tentative allocation: $ 459,815.00
Planned units: 26
Type of organization: Non-profit organization

Congressional districts served:

CD
GA-08
GA-12
GA-01
GA-02
GA-03

Source of labor: Agency and Contractors

Name: **Ninth District Opportunity Inc.**

Address: 308 Spring St
P. O. Drawer L
Gainesville, GA 30503-0000

Contact: Kay Laws
UEI: TELZQAESN8D8
DUNS: 070322342
Phone: (770) 532-3191
Fax: (770) 534-0548
Email: Kay.Laws@ndohs.org

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U.S. Department of Energy

WEATHERIZATION ASSISTANCE PROGRAM
SUBGRANTEE INFORMATION
State: GA Grant Number: SE0001817 Program Year: 2026

Counties served: BANKS County, DAWSON County, UNION County, FORSYTH County, STEPHENS County, HART County, HALL County, TOWNS County, FRANKLIN County, WHITE County, RABUN County, LUMPKIN County, HABERSHAM County

Tentative allocation: $ 311,316.57
Planned units: 17
Type of organization: Non-profit organization

Congressional districts served:

CD
GA-11
GA-10
GA-09
GA-07
GA-13
GA-06

Source of labor: Contractors

Name: **North Georgia Community Action Inc.**

Contact: Jonathan Ray
UEI: CYBAYV38JQJ7
DUNS: 092147099

Address: 1344 Talking Rock Rd
P. O. Box 760
Jasper, GA 30143-0000

Phone: (706) 692-5623
Fax: (706) 692-2804
Email: jray@ngcainc.com

Counties served: DADE County, CATOOSA County, FANNIN County, MURRAY County, PICKENS County, WHITFIELD County, CHEROKEE County, CHATTOOGA County, GILMER County, WALKER County

Tentative allocation: $ 310,600.61
Planned units: 17
Type of organization: Non-profit organization

Congressional districts served:

CD
GA-06
GA-09
GA-11

Source of labor: Agency and Contractors

Name: **Overview Inc.**

Contact: Wanda Addeo
UEI: DGE6KQUDMJX7
DUNS: 145007498

Address: 325 N Cobb St
P. O. Box 693
Milledgeville, GA 31059-0693

Phone: (478) 453-4111
Fax: (478) 453-2136
Email: waddeo@overviewinc.com

Counties served: JASPER County, WASHINGTON County, WILKINSON County, BALDWIN County, PUTNAM County, HANCOCK County, JOHNSON County

Tentative allocation: $ 124,379.39
Planned units: 7
Type of organization: Non-profit organization

Congressional districts served:

CD
GA-12
GA-10
GA-08

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U.S. Department of Energy

WEATHERIZATION ASSISTANCE PROGRAM
SUBGRANTEE INFORMATION
State: GA Grant Number: SE0001817 Program Year: 2026

Source of labor: Contractors

Name: **Southwest Georgia Community Action Council Inc.**

Contact: Randy Weldon
UEI: VGJBDE35S637
DUNS: 073453706

Address: 912 First Ave SE
Moultrie, GA 31768-0000

Phone: (229) 985-3610
Fax: (229) 890-1056
Email: rweldon@swgacac.com

Counties served:
COLQUITT County
WORTH County
SEMINOLE County
DOUGHERTY County
MITCHELL County
QUITMAN County
TERRELL County
LEE County
RANDOLPH County
THOMAS County
CLAY County
GRADY County
EARLY County
CALHOUN County
BAKER County
MILLER County
DECATUR County

Tentative allocation: $ 325,343.28
Planned units: 18
Type of organization: Non-profit organization

Congressional districts served:

CD
GA-08
GA-02

Source of labor: Agency and Contractors

Name: **Tallatoona Community Action Partnership Inc.**

Contact: Scott Gray
UEI: UPLDJEEYS453
DUNS: 070324256

Address: P. O. Box 1480
Cartersville, GA 30120-0000

Phone: (770) 382-5421
Fax: (770) 387-4302
Email: scottg@tallatoonacap.org

Counties served:
POLK County
FULTON County
HARALSON County
BARTOW County
FLOYD County
COBB County
PAULDING County
GORDON County

Tentative allocation: $ 816,181.00
Planned units: 45
Type of organization: Non-profit organization

Congressional districts served:

CD
GA-10
GA-09
GA-11
GA-06
GA-05
GA-13

Source of labor: Contractors

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U.S. Department of Energy

WEATHERIZATION ASSISTANCE PROGRAM
SUBGRANTEE INFORMATION
State: GA Grant Number: SE0001817 Program Year: 2026

Name: **Unity Community Action Council, Inc**

Address: 4036 GA-90
Montezuma, GA 31063-0000

Contact: Camille Vickers
UEI: LS6AFAVHLMZ4
DUNS: 066463258
Phone: (478) 472-3607
Fax: (478) 472-3609
Email: cvickers@wcgcac.org

Counties served:
MACON County
DOOLY County
SUMTER County
MARION County
CHATTAHOOCHEE Count
WEBSTER County
TAYLOR County
CRISP County
TALBOT County
STEWART County
SCHLEY County

Tentative allocation: $ 138,726.88
Planned units: 8
Type of organization: Non-profit organization

Congressional districts served:

CD
GA-02

Source of labor: Contractors

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OMB Control No: 1910-5127
Expiration Date: 04/30/2027

U.S. Department of Energy

Weatherization Assistance Program (WAP)

WEATHERIZATION ANNUAL FILE WORKSHEET

Grant Number: SE0001817, **State:** GA, **Program Year:** 2026

Recipient: Georgia Environmental Finance Authority

IV.1 Subgrantees

Subgrantee (City)	Planned Funds/Units
action pact (Waycross)	$514,626.31 29
Area Committee To Improve Opportunities Now Inc. (Athens)	$1,029,965.40 57
Central Savannah River Area Economic Opportunity Inc. (Augusta)	$324,014.20 18
Clayton County Community Services Authority Inc. (Forest Park)	$286,029.08 16
Coastal Georgia Area Community Action Authority Inc. (Brunswick)	$177,105.19 10
Coastal Plain Area Economic Opportunity Authority Inc. (Valdosta)	$216,406.59 12
Community Action for Improvement Inc. (LaGrange)	$368,241.50 21
Middle Georgia Community Action Agency Inc. (Warner Robins)	$459,815.00 26
Ninth District Opportunity Inc. (Gainesville)	$311,316.57 17
North Georgia Community Action Inc. (Jasper)	$310,600.61 17
Overview Inc. (Milledgeville)	$124,379.39 7
Southwest Georgia Community Action Council Inc. (Moultrie)	$325,343.28 18
Tallatoona Community Action Partnership Inc. (Cartersville)	$816,181.00 45
Unity Community Action Council, Inc (Montezuma)	$138,726.88 8
Total:	**$5,402,751.00** **301**

IV.2 WAP Production Schedule

Weatherization Plans	Units
Total Units (excluding reweatherized)	301
Reweatherized Units	0

Average Unit Costs, Units subject to DOE Project Rules		
VEHICLE & EQUIPMENT AVERAGE COST PER DWELLING UNIT (DOE RULES)		
A	Total Vehicles & Equipment ($5,000 or more) Budget	$0.00
B	Total Units Weatherized	301
C	Total Units Reweatherized	0
D	Total Dwelling Units to be Weatherized and Reweatherized (B + C)	301
E	Average Vehicles & Equipment Acquisition Cost per Unit (A divided by D)	$0.00
AVERAGE COST PER DWELLING UNIT (DOE RULES)		

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U.S. Department of Energy

Weatherization Assistance Program (WAP)

WEATHERIZATION ANNUAL FILE WORKSHEET

Grant Number: SE0001817, **State:** GA, **Program Year:** 2026

Recipient: Georgia Environmental Finance Authority

F	Total Funds for Program Operations	$2,632,419.00
G	Total Dwelling Units to be Weatherized and Reweatherized (from line D)	301
H	Average Program Operations Costs per Unit (F divided by G)	$8,745.58
I	Average Vehicles & Equipment Acquisition Cost per Unit (from line E)	$0.00
J	Total Average Cost per Dwelling (H plus I)	$8,745.58

IV.3 Energy Savings

Method used to calculate savings: ☑ WAP algorithm ☐ Other (describe below)

	Units	Savings Calculator (MBtus)	Energy Savings
This Year Estimate	301	29.3	8819
Prior Year Estimate	301	29.3	8819
Prior Year Actual	299	29.3	8761

Method used to calculate savings description:

Applicants shall provide an estimate of the amount of energy to be conserved, pursuant to §440.14(c)(4). Grantees should indicate the methodology used to determine the energy savings.

Table 4: DOE Algorithm for computing energy savings.

DOE Program	Amount	Line
Total DOE State WAP Allocation	**$6,419,489**	(a)
Total Cost associated with Administration, T&TA, Financial and Energy Audits, Health and Safety, Liability Insurance or 15% of allocation	**$1,921,752**	(b)
Subtract the amount entered in line (b) from line (a, for Total Federal (DOE) funds available to weatherize homes	**$2,920,270**	(c)
State Average Cost per Unit or National WAP Program Year Average Cost per Home	**$4,544**	(d)
Divide the amount entered on line (c) by the amount entered on line (d), for Total Estimated Homes to be Weatherized	**642**	(e)
Multiply (e) by 29.3 MBTU for Total Annual Estimated Energy Savings resulting from DOE appropriated funds	**18,810**	(f)
Total funds (e.g., DOE-WAP, PVE, State, Leveraged, LIHEAP & Other non-Federal sources of funds) used by the State to weatherized homes	**$10,107,318**	(g)
Total cost associated with the administration of Weatherization funds or 15% of total funds available to weatherize homes	**$1,516,098**	(h)
Subtract the amount entered in line (h) from line (g), for total funds available to weatherize homes	**$8,591,220**	(i)
State Average Cost per Unit or National WAP Program Year Average Cost per Home	**$4,544**	(j)
Divide the amount entered on line (i) by the amount entered on line (j), for Total Estimated Homes to be Weatherized	**1,890**	(k)
Multiply (k) by 29.3 MBTU for Total Annual Estimated Energy Savings resulting from DOE appropriated funds	**55,377**	(l)

IV.4 DOE-Funded Leveraging Activities

Leverage funds will be used for additional weatherization support for the network.

IV.5 Policy Advisory Council Members

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U.S. Department of Energy
Weatherization Assistance Program (WAP)
WEATHERIZATION ANNUAL FILE WORKSHEET
Grant Number: SE0001817, **State:** GA, **Program Year:** 2026
Recipient: Georgia Environmental Finance Authority

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

Chandra Farley	Type of organization: Unit of Local Government Contact Name: Chandra Farley Phone: 4703161936 Email: cfarley@atlantaga.gov
Chrystal Coker	Type of organization: Local agency Contact Name: Chrystal Coker Phone: 77053231912029 Email: chrystal.coker@ndocsbg.org
Consuela Thompson	Type of organization: Unit of Local Government Contact Name: Consuela Thompson Phone: 4043614442 Email: cthompson@georgiacaa.net
Cynthia Bryant	Type of organization: Unit of State Government Contact Name: Cynthia Bryant Phone: 4044631679 Email: cynthia.bryant@dhs.ga.gov
Dusniel Alvarez	Type of organization: Local agency Contact Name: Dusniel Alvarez Phone: 2299853610 Email: dalvarez@swgacac.com
Empire Construction Group	Type of organization: Other Contact Name: George Tunningly Phone: 4045841135 Email: empireconstgroup@yahoo.com
Gretchen Gigley	Type of organization: Non-profit (not a financial institution) Contact Name: Phone: 4048560723 Email: ggigley@seeaalliance.org
John Tyno	Type of organization: Local agency Contact Name: John Tyno Phone: 2292419161 Email: jtyno@coastalplain.org
Keesha Johnson	Type of organization: Non-profit (not a financial institution) Contact Name: Keesha Johnson Phone: 3034821096 Email: kjohnson@communityactionpartnership.com

IV.6 State Plan Hearings (Note: attach notes and transcripts to the SF-424)

Date Held	Newspapers that publicized the hearings and the dates the notice ran
01/29/2025	The public hearing for the Georgia WAP State Plan was held on January 29th, 2025. The official transcript has been uploaded into the SF-424. The attendees were Eneesha Maynor (GEFA), Quenton Talley (GEFA), Ameena- Abdul Hakeem (WeatheRise-ATL)
04/23/2026	The WAP Policy Advisory Council (PAC) meeting to review and approve the Georgia WAP State Plan was held the morning of April 23, 2026 following the public hearing The minutes of the PAC meeting are uploaded into the SF-424.
08/12/2026	The public hearing was posted on www.gefa.georgia.gov and was advertised in the Times-Journal for 14 days in advance of the hearing. Additionally it was announced at the monthly T&TA call attended by all subgrantees.

IV.7 Miscellaneous

Recipient Business Officer -
Kristofor Anderson
Energy Division Director
Georgia Environmental Finance Authority
kanderson@gefa.ga.gov
404-584-1031

Recipient Principal Investigator-

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Laura Whitfield
Lead Project Weatherization Manager
Georgia Environmental Finance Authority
lwhitfield@gefa.ga.gov
404-584-1061

Policy Advisory Council -
Pursuant to 10 CFR Part 440.17, GEFA has established a Policy Advisory Council (PAC) to assist in the development and operation of the program and provide advice on the development of the State Plan. The PAC is representative of subgrantees, energy advocates, state agencies, and other organizations that represent low-income, elderly persons, and disabled clients in Georgia. PAC members are well-versed in energy and housing issues.

Other Funding Sources -
The amount of LIHEAP funds available for weatherization during the 2026 program year is $7,722,073 LIHEAP funds are used in accordance with the Georgia Department of Health and Human Services approved LIHEAP application and applicable U.S. DOE and Georgia State Plan rules and regulations. Georgia has executed an HHS LIHEAP program year 2026 contract for WAP.

Production-Average Cost Per Unit -
The ACPU in the 2026 plan is determined by the allowable average cost per unit of $8813 per WPN 26-2. Georgia has worked to increase the ACPU each year. GEFA performs desk monitoring monthly on agency spend and production and tailors the monitoring schedule after historical production and trending out current production.

Georgia Environmental Finance Authority

Weatherization Readiness Fund Plan

2026-2027

This plan serves to transmit information to Georgia's Weatherization Assistance Program network (subgrantee agencies) outlining expectations for the weatherization readiness funds (WRF) made available through the Consolidated Appropriations Act of 2022. The purpose of these funds is to minimize the number of deferrals currently occurring within the network.

Through this WRF set-aside fund, the network can address necessary repairs (e.g., structural and health and safety issues) in dwellings that have been deferred from receiving weatherization services. This funding is specifically targeted to reduce the frequency of deferred homes that require other services, outside the scope of weatherization, before the weatherization services can commence. Units receiving WRF must result in a DOE completion, defined as, "A dwelling on which a DOE-approved energy audit or priority list has been applied and weatherization work has been completed." WRF were allocated to grantees using the T&TA distribution model and will be issued in WPN 26-2, Program Year 2026 Grantee Allocations.

FUND DISTRIBUTION: Georgia was allocated $506,752 in WRF, which will be divided among 14 of our subgrantee agencies as follows:

Action Inc	$ 97,292.22
Action Pact	$ 48,535.04
CAFI, Inc.	$ 34,720.53
Clayton County CSA, Inc.	$ 26,855.11
Coastal Plain AEOA, Inc.	$ 20,074.83
Coastal GA CAA Inc.	$ 16,395.03
Central Savannah River AEOA, Inc.	$ 30,112.21
Middle GA CAA, Inc.	$ 43,081.06
Ninth District Opportunity, Inc.	$ 28,979.25
North GA CA, Inc.	$ 28,966.06
Overview, Inc.	$ 11,179.76

Southwest GA CAC, Inc.	$ 30,486.20
Tallatoona CAP, Inc.	$ 77,389.86
West Central GA CAC, Inc.	$ 12,684.84

HOUSEHOLD PRIORITIZATION: WRF clients will be processed through Georgia's regular client management system. Clients currently on a deferral wait list that are still eligible will be considered immediately for WRF to move them onto the weatherization wait list. For all other WRF needs, agencies will follow the same priority and ranking used for weatherization. Units that need work that is beyond what WRF, other funding sources, and weatherization can provide will be deferred, following the regular deferral policy, and tracked.

FUNDING RESTRICTIONS: WRF must only be used for activities within same the grant award and can be used to fund work on bipartisan infrastructure law (BIL) weatherized units. WRF can only be used on homes that will receive weatherization services following the repairs. WRF funds are specific to the annual appropriation funding and must be expended on units weatherized within the formula PY 2026 grant by the subgrantees identified in the state plan application.

MONITORING OF UNITS: Agencies will inspect 100 percent of the WRF units and GEFA will inspect a minimum of 10 percent (the same amount inspected for standard field monitoring). GEFA also will add a WRF section to its QCI checklist or create a separate checklist. GEFA will monitor these funds as part of its annual monitoring of subgrantees to ensure the funds are expended in accordance with this plan and for the purposes approved by DOE, resulting in completed units.

AVERAGE STATE COST PER UNIT: The average amount of WRF that can be expended per home is $16,000.

TRACKING: Subgrantees are required to track:

- Avoided deferrals – the number of dwelling units made weatherization ready with these funds, and for each unit:
  - Year built
  - Housing type (site-built single family, manufactured housing)
  - Nature of repairs needed which prohibit weatherization (select all that apply); this is not an exhaustive list and subgrantees may add repairs as needed with advance written approval from GEFA:
    - Roof repair/ replacement
    - Wall repair (interior or exterior)
    - Ceiling repair
    - Floor repair
    - Foundation or subspace repair
    - Exterior drainage repairs (e.g., landscaping or gutters)
    - Plumbing repair
    - Electrical repair
    - Bulk Moisture Control
    - Pest Control
    - Insulation Preparation
    - Infiltration Reduction
    - Leak Repair
    - Clean-up or remediation beyond typical scope
      - Lead paint
      - Asbestos (confirmed or suspected, including vermiculite)
      - Mold and/or moisture
      - Other cleanup or remediation
  - DOE WRF expenditure per unit
  - Braided fund expenditure per unit (i.e., funds such as LIHEAP, HUD, non-federal, etc. used in conjunction with DOE WRF to make a unit weatherization ready)

Georgia Environmental Finance Authority

Mentorship Model

GEFA will implement a QCI mentorship program to Georgia's Weatherization Assistance Program network (subgrantee agencies) to support recruitment,

efficient onboarding, and promote career advancement and retention.

Mentorship Process

1. Subgrantee agencies will advertise the mentorship program to current weatherization program staff and contractors.

2. Once a potential mentee expresses interest in the program, the mentor will review the QCI Job Task Analysis with the mentee to define the scope of work that will lead to QCI certification.

3. The mentee will work alongside energy auditor and QCI mentors to learn the tasks necessary for passing the QCI written and field test.

4. The mentee must perform a minimum of 10 audits with modeling software and complete 10 independent inspections, which must be approved by the QCI mentor. Approval will be granted after an onsite or virtual review of the mentee's performance. Both the mentee and certified QCI are required to sign the GEFA Weatherization Assistance Program Quality Control Inspection Form.

5. When the energy auditor and QCI mentor rates the mentee as proficient to work alone, the mentee will be able to complete solo inspections. The mentee will use video and/or other virtual technology to document their inspection process. The certified QCI mentor will then review the inspection either onsite or virtually. If approved, the mentee and the certified QCI mentor will sign off on the mentee's inspection on the GEFA Weatherization Assistance Program Quality Control Inspection Form.

6. GEFA will assist in bringing qualified trainers to Georgia from IREC accredited training centers to provide classes for mentees and others on the following topics: building science, building/envelope analysis, mobile homes, and retrofit installer. Mentees shall attend at least one class every other month while in training. Mentees without construction experience are required to take the retrofit installer class. Mentees may take classes coordinated by GEFA or any IREC-accredited training center.

7. GEFA will monitor at least 10% of completed units that were inspected by the mentee.

8. GEFA expects that a minimum of 6 months will be necessary to prepare a mentee to take the energy auditor and QCI exams.

9. Disciplinary Actions: If a QCI mentor or mentee is found to be negligent, either through repeat findings or gross negligence in their duties, GEFA may institute the following:

· Additional training

· Temporary suspension of agency's use of mentorship program (e.g., six months)

· Permanent suspension of agency's use of mentorship program

Georgia Environmental Finance Authority

Weatherization Work Study Program (Pending DOE Approval)

In order to enhance Georgia's workforce, GEFA has enlisted the assistance of EverBlue to establish a weatherization work study program for the purposes of recruiting and retaining talent within Georgia's weatherization network. Everblue will manage the enrollment process and supplement reimbursement for this pilot project. Participants will enroll in each course provided in the following course schedule. Travel fees will be paid one week ahead of course training date. Supplements will be provided to the student at the successful completion of each training program. Completion is defined as attending the entire training program and earning a certificate of completion or industry certification.

Georgia Environmental Finance Authority

Pre Apprenticeship Program

There has been a surge in demand for home weatherization across many states, resulting in a significant workforce shortage. To address this challenge, a new program has been introduced in Georgia. This initiative offers a short-term training opportunity for Georgia residents, designed to quickly prepare them for employment in the weatherization sector.

The program's key features include:

1. Rapid training: Participants undergo a focused, short-term training curriculum.
2. Employment Opportunity: Upon successful completion of the program, trainees are offered opportunities to pursue full-time employment within 90 days.
3. Local focus: The initiative specifically targets Georgia residents, aiming to build a skilled local workforce.

This program serves a dual purpose by addressing the critical workforce shortage in weatherization services while simultaneously creating job opportunities for Georgia residents. It represents a strategic response to the increased demand for energy-efficient homes, aligning with the goals of the Bipartisan Infrastructure Law as well as formula funded grants.

Proposed Training Materials and Methods

Everblue will act as the central coordinating agency, aligning our training efforts across all of Georgia's WAP regions. This comprehensive approach would ensure consistent program delivery and empower new and existing WAP contractors through our diverse training portfolio, including apprenticeships, which is designed to launch and elevate careers in the weatherization field.

Everblue teaches high-quality programs nationwide and provides online learning management systems. Our proposal combines those two capabilities to offer a hybrid training methodology. This methodology will help recruit, train, upskill, and retain the weatherization workforce by making training higher quality, more accessible, and immediately impactful in the trainee's life.

EverCert Learning Management System. This online system is key to our methodology. It enrolls and tracks not just online training but the trainee's entire journey, including in-person courses, post-course support, and training pathways (as laid out in the sample training and certification schedule). Learn more about EverCert and our LMS software.

Marketing & Recruitment Strategies

Everblue will utilize a comprehensive, multi-channel recruitment strategy to attract qualified pre-apprentices and secure the participation of Wx-related agencies across the state.

- Targeted Outreach and Matchmaking**:** We'll go beyond traditional methods like flyers and job fairs. We'll partner with career counselors, social service agencies, and community-based organizations to reach potential candidates in underserved communities, interview them before enrollment, and match them with potential employers/weatherization agencies as early as possible.
- Digital Marketing**:** Targeted social media ads and informative online content will attract candidates interested in weatherization careers and, to galvanize employer/weatherization agency interest in participating in the program, we will also disseminate employer-focused digital messaging explaining the unique benefits of hiring apprentices.
- Information Sessions and Workshops**:** Information sessions and workshops will provide pre-apprentices and employers/weatherization agencies with a clear understanding of program benefits and career paths, as well as the opportunity to ask questions and address any barriers to participation.
- Workforce Development Hub**:** Everblue will create a user-friendly online resource where recruitment and matchmaking between employers/weatherization agencies and GA WAP apprentices can be easily facilitated and tracked.

Engaging Employers/ Wx Agencies:

- Everblue will co-host job fair days and participate in industry events alongside Wx agencies, presenting the program's benefits to potential candidates and employers.

Screening Tools

Everblue will implement a comprehensive screening plan to identify the ideal candidates for this program. Deliverables include:

- A written application that captures demographic information, as well as, work history and educational background.
- A workplace skills assessment that measures knowledge on basic workplace knowledge and minor construction skills.
- An interview process that screens individuals for professionalism and commitment to the program.
- A comprehensive applicant tracking system that tracks progress and maintains consistency across the program.

Description of the Proposed Training and Materials for Pre-Apprentices

Everblue's proposed pre-apprenticeship program, funded through Georgia's WAP program, offers a unique and comprehensive approach to workforce development. This program goes beyond traditional training by also encompassing wraparound services, career counseling, professional development skill-building, and other resources that empower apprentices to succeed. Ultimately, Everblue's proposed program will help create a pipeline of highly skilled weatherization professionals in Georgia, with a particular focus on empowering residents from disadvantaged communities. At a high level, it will include:

- **In-depth technical training:** This covers a broader range of skills compared to standard training, equipping them for a wider variety of weatherization tasks.
- **Multiple certifications:** Completion of the program leads to industry-recognized certifications, demonstrating expertise and increasing employability.
- **Professional development skill-building:** Everblue will offer pre-apprenticeship workshops to enhance resume writing, interview skills, customer service skills, and job readiness. This will help ensure we develop a well-rounded group of professionals who can excel in various roles.
- **Wraparound services & supplemental wages:** Recognizing potential barriers, we offer support services like childcare assistance and transportation to

alleviate financial concerns and allow full participation.
- **Focus on entry-level & basic tasks:** The program starts with a solid foundation in core weatherization tasks, ensuring a smooth transition into the workforce. As apprentices gain experience, they progress to more complex tasks throughout the program.

Proposed Training Formats (i.e. in person, virtual, hybrid, etc.).

Everblue will offer a mix of in person, virtual, and hybrid training. Many of the courses we offer feature a mix of all three learning formats simultaneously, which would make them even more accessible to apprentices. Some training will be offered online via our Learning Management System (LMS) so that new employees can immediately access the training without having to wait for the current once-a-year training offerings.

Everblue prioritizes student success, evidenced by our proven track record in delivering apprenticeship programs alongside various partners. Our dedicated student advisors are the key to our ability to foster a supportive and enriching learning environment for apprentices. These advisors forge long-term, personal relationships with each apprentice, going above and beyond answering student questions. They support students in the following ways:

- **Provide Logistical Support:** From transportation issues to training access, our advisors help overcome logistical hurdles to ensure smooth attendance.
- **Connect Apprentices with Financial Resources:** Everblue's student advisors connect apprentices with childcare resources when needed, allowing parents to focus on training.
- **Problem-Solving Support:** Whether it is online training login issues or internet connectivity, our advisors are available to troubleshoot and resolve any problem.
- **Flexible Learning Options:** Recognizing the importance of adaptability, we adjust training schedules, offering online alternatives for unforeseen attendance challenges.

Everblue's student advisors provide comprehensive support throughout the training journey:

- **Welcome Call:** Every student receives a personalized Student Success call from our team to establish a relationship, explain training procedures, and answer questions.
- **In-Person Support:** Everblue instructors often accompany apprentices to training sites so they can be readily available during in-person sessions, offering support and guidance.
- **Online Support:** Students enrolled in online training have access to our NC-based customer success team, reachable via phone, email, or live chat 5 days a week, 9 hours per day from 8 am to 5 pm Eastern Time business hours. Additionally, some of Everblue's online courses offer interactive forums to foster peer-to-peer interaction.

Continuous Improvement Through Feedback: Our commitment to building trust with apprentices yields valuable feedback that fuels program improvement. For example, based on feedback from the first Coalfield apprenticeship cohort in Huntington, WV, we identified a need for greater flexibility in online course scheduling and more hands-on training opportunities. These adjustments are actively being incorporated into the upcoming cohort offering.

Project Goals & KPIs

Industry Certifications Earned	150
Certification Pass Rate	75%
Course Completion Rate	85%
Participant Satisfaction Score	90%
Target Number of Individuals	120

Metrics for Reporting

Everblue will help develop a list of metrics that indicate success of the weatherization training. These metrics will be collected by Everblue, leading partners, and the participating agencies. These metrics will include the following:

1. All apprentice demographic data
2. # of badges earned
3. # of hours of on-the-job training
4. # of full time job offers
5. Hours worked by apprentices
6. Average apprentice salary / wages earned by apprentices
7. # of promotions offered
8. Number of homes weatherized
9. # of calls held with apprentices and the hiring employer/wx agency
10. Survey results rating different parts of the apprenticeship experience including data on job quality from trainees by way of post-employment surveys.
11. Longevity of employment
12. List of training courses taken
13. Number of certifications earned by apprentices
14. # of cohorts run

U.S. Department of Energy

Weatherization Assistance Program (WAP)

WEATHERIZATION ANNUAL FILE WORKSHEET

Grant Number: SE0001817, **State:** GA, **Program Year:** 2026

Recipient: Georgia Environmental Finance Authority

OMB Control No: 1910-5127
Expiration Date: 02/28/2025

U.S. Department of Energy

Weatherization Assistance Program (WAP)

STATE PLAN / MASTER FILE WORKSHEET

Grant Number: SE0001817, **State:** GA, **Program Year:** 2026

Recipient: Georgia Environmental Finance Authority

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

V.1 Eligibility

V.1.1 Approach to Determining Client Eligibility

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

A family unit income is defined as being at or below 200 percent of the poverty level as specified in the most current version of DOE's Federal Poverty Guidelines and Definition of Income. All dwelling units to be weatherized shall be determined eligible in such a manner to ensure that each weatherized unit meets the qualifications of 10 CFR 440.22, for eligible dwelling units. Eligibility may be categorical or traditional.

Categorical Eligibility:

WAP's expansion of categorical income eligibility included HUD means-tested programs. Categorical eligibility applies when one or more persons living in the unit has received cash assistance payments under Title IV or XVI of the Social Security Act or applicable state or local law at any time during the 12 - month period preceding the determination of eligibility for weatherization assistance. Or one or more persons in the unit is eligible for assistance under the Low Income Home Energy Assistance Act of 1981, provided that such basis is at or below 200 percent of the poverty level.

Traditional Eligibility:

Traditional eligibility applies to any household whose income is at or below 200 percent of the poverty level determined in accordance with criteria established by the director of the Office of Management and Budget for the 12 months preceding the application.

Describe what household eligibility basis will be used in the Program

A household shall be defined as a family unit meeting the qualifications above in order to be eligible for weatherization. In Georgia, any household meeting either categorical or traditional eligibility would be eligible to receive weatherization benefits by the Weatherization Assistance Program (WAP).

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

Georgia will follow the policies outlined in Georgia Security and Immigration Compliance Act (GSICA) O.C.G.A. Section 50-36-l (e) (2), located at http://www.lexisnexis.com/hottopics/gacode/ when determining eligibility of qualified and non-qualified aliens. Georgia will not deny access to any alien, state or local benefits that meet the definition of excepted services described in 8 U.S.C Section 1611(a).

V.1.2 Approach to Determining Building Eligibility

Procedures to determine that units weatherized have eligibility documentation

The applicant must provide income documentation satisfactory to the subgrantee outreach worker that demonstrates the household meets the eligibility requirements. The documentation must be maintained in the client file and made available for inspection by subgrantee and state staff. Applicant income must be verified for the one-year period prior to the certification month. In accordance with DOE Weatherization Program Notice (WPN)25-3, income data for a part of a year may be annualized in order to determine eligibility. For example, by multiplying by four the amount of income received during the most recent three months.

The method of calculation is to be determined by the subgrantee and should be uniformly applied when possible. Tax forms may be used to verify income only if the certification period is from January through December. Applications on file for one year or more must re-certify income for the year prior to pre-inspection. Applicant eligibility verification shall be documented in the file and shall include, at minimum, (1) which 12-month period was considered, (2) a list of all sources of applicant income, (3) documentation of income from each source for the period(s) being considered, and (4) the date and initials of the subgrantee employee verifying income.

Describe Reweatherization compliance

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Dwelling units weatherized under federal programs, may not receive further financial assistance for weatherization until the date that is 15 years after the date such previous weatherization was completed.

Georgia uses Hancock software system to track homes that have been previously weatherized. Subgrantees are required to check Hancock prior to starting work to ensure the unit has not been weatherized within the last 15 years under federal programs.

Describe what structures are eligible for weatherization

Structures eligible for weatherization include single family, manufactured housing, and multi-family housing. All structures must be stationary and have a specific mailing (street) address. Campers and non-stationary trailers are not eligible.

Additionally, every dwelling weatherized must meet both the client eligibility and the building eligibility requirements. Structures are ineligible for weatherization funds if they are condemned, scheduled for demolition, or designated for acquisition or clearance by a federal, state, or local program within 12 months from the date of weatherization scheduled completion. Structures will be assessed to ensure that weatherization measures will be effective. The expected lifetime of measures and their benefit will be taken into consideration when assessing structure eligibility. Conditions that constitute such limitations may include, but are not limited to:

- If remodeling or rehabilitation of the property (either planned or in progress) is substantial enough to degrade the effectiveness of weatherization.
- If the conditions of structural or mechanical systems of the home are such that it is not safe and /or possible to install or complete core measures; i.e., furnace safety and efficiency inspections and repair, blower door guided envelope air sealing, insulation.
- If it is not possible to improve the condition of the structure sufficiently to allow the installation of the core measures with the maximum allowed for incidental repair, or with coordinated rehabilitation funding.
- If, at a minimum, health and safety items cannot be addressed.

If conditions exist that preclude the weatherization of the structure, a brief written description of the conditions will be supplied to the client. This notification will be coupled with the notification that weatherization assistance is deferred until such time that the problem conditions have been resolved. The subgrantee will inform the client of a reasonable amount of time for the resolution of the problem conditions. Subgrantees will exercise caution in dealing with non-traditional type dwelling units to ensure that they meet program regulations regarding building eligibility

For Program Year 2026, GEFA will not weatherize shelters or any other-non traditional buildings.

Describe how Rental Units/Multifamily Buildings will be addressed

In the weatherization of multi-unit buildings, DOE regulations require that 66 percent (50 percent for duplexes and fourplexes) of dwelling units in the building must be eligible households or will become eligible within 180 days as referenced in 10 CFR 440.22(b). A subgrantee shall weatherize the entire multi-family building when the building is eligible. In multifamily buildings or row house buildings where there is a complete separation between units of building thermal barrier, air pressure boundary, and mechanical systems, each unit can be considered a single- family building and would need to be deemed eligible, audited and reported as such.

A National Energy Audit Tool (NEAT) audit is required for multi-family residential buildings that contain two to four units, and all measures must be cost justified. Pre-approval from GEFA is required for any work to be performed on residential multi-family buildings with five or more units. Within the constraints of the program, a subgrantee shall provide services to buildings that have rental dwelling units occupied by eligible program participants or units that are expected to be occupied by eligible program participants within 180 days of completion of the weatherization work. A subgrantee shall weatherize the entire multi-family building when the building is eligible.

In compliance with 10 CFR 440.22, the following procedures shall be used in the weatherization of multi-family/rental dwellings:

1. Subgrantees shall use the financial assistance guidelines for dwelling units to determine eligibility.
2. Rental units should be treated the same as with owner-occupied buildings in determining appropriate measures to be performed.
3. Multi-family buildings, which include duplexes, buildings with three or four units, and buildings with five or more units are eligible to receive weatherization services in Georgia. The NEAT audit must be used on buildings that contain two to four units and all units must be audited. GEFA will secure audit and project approval from DOE before approving any subgrantee to perform work on multi-family buildings with five or more units.
4. Subgrantees shall obtain a signed authorization form from the owner/landlord of the building or a designated agent authorizing the work to be done and agreeing to the landlord's financial participation in weatherization costs. Subgrantees should develop a detailed description of the weatherization measures

authorized and costs assigned to the landlord and the subgrantee. Rents shall not be raised because of the increased value of dwelling units due solely to weatherization assistance provided under this part. The agreement shall include a provision that the landlord agrees not to raise the rent for at least two years from the time the work is completed, unless raising the rent is based on factors unrelated to the weatherization improvements. The client shall be provided a copy of the signed agreement.

5. In order to weatherize an entire multi-family building, the building must have at least 66 percent program eligibility rate (50 percent for duplex or fourplex) including those units that will become eligible within 180 days under a federal, state or local government program for rehabilitating the building or making similar improvements to the building. If the entire building is not eligible for weatherization because there are not enough units occupied by eligible families, service to the entire building shall be denied.
6. The maximum amount of grant funds that can be spent for weatherization is determined by the number of units within the building occupied by eligible families/tenants, multiplied by the average cost per home. That amount may be spent on measures for the entire building. For reporting purposes, all units receiving weatherization may be reported as completed units.
7. Approved measures (10 CFR 440, Revised Appendix A) that are applicable to multi-family units should be assessed, prioritized, and implemented in an energy savings/cost effective manner appropriate to the particular building.
8. If a building contains one or more dwelling units and is also used for commercial purposes, only the part of the building occupied by an eligible household may be weatherized. Subgrantees may not weatherize commercial property. As described in 10 CFR 440.22, an eligible multi-family dwelling unit applies to rental units occupied by a family unit. Therefore, commercial property cannot be counted as a unit when determining the number of units in the building. Where a measure will need to be installed on both an eligible dwelling unit and a commercial area to be effective, the subgrantee shall charge the portion associated with the eligible unit to the program and charge the portion associated with the commercial area to the property owner. The amount charged to the property owner may not be counted toward the owner contribution if an owner contribution is required under 10 CFR 440.22 (d). If the property owner declines the measure or declines to pay a portion associated with the commercial area, the dwelling unit must be denied.
9. No undue or excessive enhancements shall accrue to the value of weatherized dwelling units in Georgia. Weatherization measures to be completed on rental units, as on owner units, must be cost-effective, as determined by a NEAT audit or DOE- approved audit method. The state may recoup costs of excessive weatherization measures.
10. The benefits of weatherization services shall accrue primarily to the low-income tenants residing in the unit.
11. Subgrantees must receive written permission from the owner (or authorized representative) to weatherize the building. Subgrantees are required to use the WAP Authorization Form for each rental weatherization project. The form can be found on GEFA's website, www.gefa.org.
12. Subgrantees working on one to four unit rentals must follow these steps prior to performing weatherization work:
    a. Evidence that the owner understands they must not raise rent(s) for a period of two years because of the increased value of the dwelling unit(s) when the value is increased solely because of the weatherization work.
    b. Notify tenants that rent cannot be increased per item ten (10) above.
    c. Tenants are notified of owner contributions in the form of rebates and rent reductions, where required.
    d. Notify tenants in writing of the formal complaint process.
13. For a subgrantee to work on a multi-family unit with five or more units, the preliminary investigation and permission process described below must be followed and approved by GEFA. Owner contribution in a letter of commitment is required as a part of the approval process based on the following parameters. If the owners are responsible for paying heating costs, or multi-family units are master-metered, owners may be required to make a contribution amounting up to 15 percent of the total cost of the weatherization work. If the tenant is responsible for paying heating costs, the owners are required to make a contribution amounting to 10 percent of the total cost of the weatherization work. In addition, if heating/cooling system replacements are involved, the owner must contribute 25 percent of the replacement cost of the heating/cooling system. The total commitment amount, expressed as a percentage of the total expected cost of the work to be performed, must be included in the letter of commitment.
14. The owner may meet the owner contribution requirement in any of the following ways:
    a. Cash contribution.
    b. Rebate or rent reduction (the rebate period cannot exceed two years).
    c. Donation of weatherization materials.
15. An exception is made for owners who are themselves eligible for weatherization services because through the Georgia WAP. These owners are not required to make contributions.

Multi-family buildings with five or more units preliminary investigation and permission process.

A subgrantee must secure from the property owner(s) the information needed to complete the multi-family preliminary application. Subgrantees must use the authorization form provided by GEFA and all required information must be completed. Subgrantees are advised to follow these steps when submitting paperwork to GEFA for approval:

1. Tenant Issues:

- Cover letter that includes how tenants will be notified of the WAP and health and safety requirements (i.e., lead and mold information, and health and safety issues) as required.
- Evidence that the owner understands the cost of the contribution they are required to make and the methods allowed to meet the contribution per item 14 above.
- Affected households eligible for weatherization are notified that rent cannot be increased for a period of two years per item four above.

- Tenants are informed of owner contributions in the form of rebates and rent reductions, where required.
- Tenants are notified in writing of the formal complaint process.

2. Property Documents:

- Preliminary application.
- Detailed scope of work highlighting the proposed weatherization measures and any energy problem areas.
- Matching funds description if owner is using other programs for other repair and/or renovations (i.e., low-income housing tax credits, etc.).
- Letter of commitment from owner outlining their contribution.
- Project schedule.
- Net energy savings/benefit potential.
- For additional guidance, please refer to https://www.energy.gov/scep/wap/articles/weatherization-program-notice-22-12-multifamily-weatherization and https://www.energy.gov/sites/default/files/2023-11/Multifamily-Case-by-Case-Project-Submittal-Checklist_111623.xlsx .

GEFA will review the above documents for accuracy and provide preliminary approval/disapproval. Upon preliminary approval for the preliminary phase, the subgrantee may move forward with the final application and landlord agreement.

Final application.
Subgrantee submits all supplement/final applications and landlord agreement to GEFA along with a final project budget and scope. Upon review, GEFA will submit the entire package to DOE for approval. Upon DOE approval, GEFA will issue an approval/disapproval letter. Work cannot start on a multi-family project with five or more units unless a subgrantee has received the final approval letter from GEFA.

Multi-family/rental weatherization complaint procedures are to be followed in the following order:

1. Tenant or property owner to contact subgrantee to file complaint.
2. Subgrantee instructs tenant or property owner to complete formal written complaint.
3. Subgrantee contacts tenant or property owner to notify the other party of the complaint.
4. Tenant or property owner must submit written rebuttal.
5. Subgrantee determines if the complaint is legitimate.
6. If the complaint is legitimate (violating agreement), subgrantee writes a letter to the property owner or tenant giving them a 30-day notification to remedy the problem and submit documented proof or face penalties and/or action.
7. If not remedied locally, escalate to GEFA WAP with all written documentation. The written request for investigation should be sent to: Weatherization Assistance Program, Energy Resources Division, 47 Trinity Ave SW, Fifth Floor, Atlanta, GA 30034.
8. GEFA writes a letter to property owner or tenant with a 30-day remedy period. GEFA to copies all other funding agencies involved in the property.
9. If no remedy, refer to Georgia Department of Law.

Describe the deferral Process

The Georgia WAP may elect to defer a home from receiving weatherization services where health and safety hazards exist for subgrantee staff, contractors, clients or where conditions prevent the safe and effective implementation of weatherization measures. Please see the Georgia Health and Safety plan for a full list of deferral and referral conditions.

It is the client’s responsibility to correct the deferral condition(s) in order for weatherization services to proceed. When the conditions causing the deferral have been addressed, clients are asked to contact the weatherization subgrantee to reevaluate the home. When possible, weatherization subgrantees are encouraged to make referrals or collaborate with programs including utility sponsored weatherization, Healthy Homes programs, home repair programs and other local resources in order to best serve the client.

Deferrals procedures during audit.
If, during an audit, the auditor arrives at a home, and determines it should be deferred prior to concluding the audit, the auditor shall immediately contact the subgrantee weatherization director to describe the situation and ask for guidance. If, in the auditor's judgment during the audit, they feel the house should be deferred for a problem likely and/or easily fixed and that the home will eventually be weatherized, the audit may continue, however, the auditor shall immediately contact the subgrantee weatherization director to describe the situation and ask for guidance. If possible, the weatherization director (or assignee) may want to meet the auditor in the field to discuss the situation further and review program guidance for ways to allow the audit to continue and avoid deferral. No home may be deferred without approval from the subgrantee weatherization director. If possible, all areas of the home should be inspected to identify all deferral issues in order to avoid multiple deferrals. Photos of all deferral conditions must be taken and included in the client file.

If the home must be deferred, the auditor must have the client sign a deferral form that includes the reasons for deferral. If deferral occurs before the audit is

completed, the unit is eligible for payment, as an audit cut short for deferral reason. If the cause of the deferral is resolved, the subgrantee shall assign the same auditor to the unit to conclude the audit. If a home is deferred after the audit is completed, payment may not be made unless and until the administrative procedures to be followed for deferred units below is concluded.

Deferral procedures at time of measure installation.
Any crew or contractor who arrives on the site and discovers what they believe to be a cause for deferral shall immediately contact the subgrantee weatherization director to discuss the situation and determine a course of action. No work shall be done on the home.

Contractor payment.
If the unit is deferred, the contractor shall fill out a deferral form listing the reasons for deferral and obtain the client's signature before departing the home. The contractor shall then be entitled to payment for work completed prior to the deferral.

Administrative procedures to be followed for deferred units.
Once a unit has been deferred, the subgrantee shall make every effort to bring clients back into the program. The subgrantee shall:

1. Direct a letter to the client informing them the home has been deferred and asking the client to correct the deferral conditions should they wish to receive WAP services, and contact the subgrantee when work is complete. The subgrantee should give the client a minimum of 15 days or a reasonable amount of time to correct the issues. The letter should refer the client to any resources that may assist with the deferral conditions.
2. If no action is taken by the client, a second letter will be sent to the client by certified mail informing them that they must contact the subgrantee within 10 days to be eligible for weatherization.
3. If no response is received to the certified letter, the unit is removed from further consideration by the WAP.
4. With the exception of renters, if a client states that they cannot or will not make the needed repairs, a final letter shall be sent to the client informing them that they have been removed from the program and that they may not participate in the WAP in the future. Removal from the program will track with the client at the time of initial WAP visit.

All letters and documentation of efforts to contact or help the client shall be kept in the client's file by the subgrantee.

Notification and appeal.
Clients shall be informed in writing by the subgrantee when services are denied or withdrawn based on deferral guidelines above. The denial notice will include instructions for appeal of the denial and/or the steps the client must take to allow the subgrantee to proceed with weatherization service.

Weatherization Readiness Fund Plan

This plan serves to transmit information to Georgia's Weatherization Assistance Program network (subgrantee agencies) outlining expectations for the weatherization readiness funds (WRF) made available through the Consolidated Appropriations Act of 2022. The purpose of these funds is to minimize the number of deferrals currently occurring within the network.

Through this WRF set-aside fund, the network can address necessary repairs (e.g., structural and health and safety issues) in dwellings that have been deferred from receiving weatherization services. This funding is specifically targeted to reduce the frequency of deferred homes that require other services, outside the scope of weatherization, before the weatherization services can commence. Units receiving WRF must result in a DOE completion, defined as, "A dwelling on which a DOE-approved energy audit or priority list has been applied and weatherization work has been completed." WRF were allocated to grantees using the T&TA distribution model and will be issued in WPN 26-2, Program Year 2026 Grantee Allocations.

HOUSEHOLD PRIORITIZATION: WRF clients will be processed through Georgia's regular client management system. Clients currently on a deferral wait list that are still eligible will be considered immediately for WRF to move them onto the weatherization wait list. For all other WRF needs, agencies will follow the same priority and ranking used for weatherization. Units that need work that is beyond what WRF, other funding sources, and weatherization can provide will be deferred, following the regular deferral policy, and tracked.

FUNDING RESTRICTIONS: WRF must only be used for activities within same the grant award and can be used to fund work on bipartisan infrastructure law (BIL) weatherized units. WRF can only be used on homes that will receive weatherization services following the repairs. WRF funds are specific to the annual appropriation funding and must be expended on units weatherized within the formula PY 2026 grant by the subgrantees identified in the state plan application.

MONITORING OF UNITS: Agencies will inspect 100 percent of the WRF units and GEFA will inspect a minimum of 10 percent (the same amount inspected for standard field monitoring). GEFA also will add a WRF section to its QCI checklist or create a separate checklist. GEFA will monitor these funds as part of its annual monitoring of subgrantees to ensure the funds are expended in accordance with this plan and for the purposes approved by DOE, resulting in completed units.

MAXIMUM AMOUNT PER UNIT: The average amount of WRF that can be expended per home is $16,000.

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TRACKING: Subgrantees are required to track:

- Avoided deferrals – the number of dwelling units made weatherization ready with these funds, and for each unit:
  - Year built
  - Housing type (site-built single family, manufactured housing)
  - Nature of repairs needed which prohibit weatherization (select all that apply); this is not an exhaustive list and subgrantees may add repairs as needed with advance written approval from GEFA:
    - Roof repair/replacement
    - Wall repair (interior or exterior)
    - Ceiling repair
    - Floor repair
    - Foundation or subspace repair
    - Exterior drainage repairs (e.g., landscaping or gutters)
    - Plumbing repair
    - Electrical repair
    - Bulk moisture control
    - Pest Control
    - Insulation Preparation
    - Leak Repair
    - Clean-up or remediation beyond typical scope
      - Lead paint
      - Asbestos (confirmed or suspected, including vermiculite)
      - Mold and/or moisture
      - Other cleanup or remediation
  - DOE WRF expenditure per unit
  - Braided fund expenditure per unit (i.e., funds such as LIHEAP, HUD, non-federal, etc. used in conjunction with DOE WRF to make a unit weatherization ready)

V.1.3 Definition of Children

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

V.1.4 Approach to Tribal Organizations

☑ Recommend tribal organization(s) be treated as local applicant?
If YES, Recommendation. If NO, Statement that assistance to low-income tribe members and other low-income persons is equal.

The state of Georgia will recogonize the applicants of the three designated Indian tribes of Georgia as equal low-income clients.

V.2 Selection of Areas to Be Served

All 159 counties in Georgia will be served. The grantee will ensure that funds are allocated to areas based on relative need for the service area. GEFA will have 14 direct contracts with community action agencies (CAA) to implement the WAP. These subgrantees will ensure that WAP services are available in all 159 of Georgia's counties. Some providers may use nonprofit partners to carry out the work of the weatherization program, but the grantee will recognize and communicate with the subgrantees.

A two-part formula is used to allocate the federal funds between subgrantees. The formula takes into consideration low-income families and geographic area (square miles). The formula uses the county as the basic building block. The data is taken from the U.S. Census. The county data is assembled to reflect the total area served by a subgrantee, expressed as V1. The total number of low-income families served by a subgrantee, expressed as V2. To maintain the priority of servicing low-income families, the variables are weighted. Each area receives a weighted value of 0.2, and a weighted value of 0.8 is assigned for the number of low-income families in a given area.

The combination of the weighted variable {i.e. (V1 x .2) + (V2 x .8) yields a subgrantee factor. When divided by the summation of subgrantee factor, it

produces a funding level requirement expressed as a percentage. The percentage is then applied to total estimated funds available, not including carryover, to determine the estimated allocation for each subgrantee. Allocation of funds to subgrantees and across budget categories will be based on the base formula and will not require additional public hearings.

The WAP Policy and Procedures Manual describes the state's response to subgrantee noncompliance, including recoupment or reduction of funding, subgrantee probation, and subgrantee termination.

Redistribution Provision: GEFA retains the right to allow for reallocation of funds to subgrantees and across budget categories using the same formula as originally proposed or any other funding plan that meets the needs of targeted Georgia citizens. GEFA retains the right to reassign subgrantee territories to other existing subgrantees operating a WAP program to ensure continuous service coverage to all 159 counties. This can be done without holding additional public hearings. Active management and reallocation of the grant allows the grant to be fully expended during the budget period. Details about termination and corrective action plans for subgrantees are described in the monitoring section of the Master File.

Per WPN 25-2, for planning purposes GEFA has developed this plan and funding using the 2025 funding levels until final allocations are determined. GEFA will make final adjustments to the funding levels necessary to align with final DOE allocations.

V.3 Priorities

All Georgia WAP applicants will be prioritized according to the following standard procedure. Georgia's subgrantees will use an application prioritization system resulting in priority points, to the maximum extent practical. Priority is given to program eligible persons who are elderly, disabled, children, a high residential energy user, or a resident in a household with a high-energy burden as defined by 10 CFR 440.

Hancock system will be used to score all eligible applicants. Priority points will determine client position on the waiting list by county. Subgrantee's DOE contracts contain the required unit production by county in their service territory. Once the required units have been met in that county, and if funding is available, priority service will be determined by the next highest score in the subgrantee's service territory.

The following priority categories and priority points will be used:

- Age: A total of four points if the household contains any member under age 18 years or 60 years or over. A total of zero points if the household does not contain any members in those groups.
- Disability: One point for each family member with a disability.
- High Energy Use/High Energy Burden: Household with high heating utility bills. This is calculated by taking the monthly household energy cost and dividing it by the monthly household income. This equals the percentage of energy burden.

Priority Group 1 Energy Burden 35.1 - 50%	6 points
Priority Group 2 Energy Burden 25.1 - 35%	5 points
Priority Group 3 Energy Burden 15.1 - 25%	4 points
Priority Group 4 Energy Burden 10.1 - 15%	3 points
Priority Group 5 Energy Burden 5.1 - 10%	2 points
Priority Group 6 Energy Burden 0- 5%	1 point

- Additional priority groups (when applicable).

Subgrantees may give priority to clients who fall into the following categories:

Emergency: When a genuine emergency exists, which poses an imminent threat to the life, health or property of the client, and when that emergency situation can be corrected by WAP services, and when other options to correct or alleviate the threat are unavailable or impractical.

Elderly, chronically ill, children: A priority exists when the household includes members who are elderly, chronically ill, or have children under 18.

State or federal declaration of disaster: Instances that warrant a designation of an area or areas as a disaster area, clients identified in these areas may be offered general or specific services on a priority basis.

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V.4 Climatic Conditions

The climate of Georgia is typical of a humid subtropical climate with most of the state having mild winters and hot summers. The Atlantic Ocean on the east coast of Georgia and the hill country in the north impact the state's climate. Also, the Chattahoochee River divides Georgia into separate climatic regions with the mountain region to the northwest being colder than the rest of Georgia, the average temperature for that region in January and July being 39 °F (4 °C) and 78 °F (26 °C) respectively. Winter in Georgia is characterized by mild temperatures and little snowfall around the state. Colder temperatures with the potential for snow and ice occur across northern and central Georgia. Many summer days in Georgia have been known to exceed 90 °F (32 °C). The state experiences widespread precipitation. Tornadoes and tropical cyclones are common.

The state's climate is tempered somewhat by occasional polar air masses in the winter. Hot and humid summers are typical, except at the highest elevations. The degree to which the weather of a certain area of Georgia is subtropical depends not just on the latitude, but also on how close the area is to the Atlantic Ocean or Gulf of Mexico and the altitude. This is especially true in the mountainous areas in the northern part of the state, which are further away from ocean waters and can be up to 4,500 feet (1,400 m) or higher above sea level. The areas near the Florida/Georgia border, extending from the entire Georgia coastline west to the Florida panhandle, experiences the most subtropical weather, similar to that of Florida: hot, humid summers with frequent afternoon thunderstorms and mild, somewhat drier winters. In spite of having moderate weather compared to many other states, Georgia has occasional extreme weather. The highest temperature ever recorded is 112 °F (44 °C), while the lowest ever recorded is -17 °F (-27 °C). Heat waves involving temperatures over 100 °F (38 °C) have been recorded in the past. The entire state, including the north Georgia mountains, receives moderate to heavy rain, which varies from 45 inches (1,100 mm) in central Georgia to approximately 75 inches (1,900 mm) around the Northeast part of the state.

Snowfall occurs most winters, which increases in frequency and average amounts per year farther north in the state. In mountainous areas of Fannin, Gilmer, Pickens, and other surrounding counties, heavy snow is defined as 3 inches (7.6 cm) or more of snow in a 12 hour period or 4 inches (10 cm) or more of snow in a 24-hour period.

Georgia's autumns are normally sunny and cool in September and October, the driest months of the year, with temperatures that are near 78 °F (26 °C) during the daytime. At night, the temperature drops to near 50 °F (10 °C). It is much cooler in November with an average high of 62 °F (17 °C) and low of 36 °F (2 °C). The first freeze of the year normally occurs in November, except in the northern mountains, where it occurs in October. When conducting a computerized audit, subgrantees select the weather station closest to client’s dwelling to ensure that climatic variations are considered when determining what is cost effective.

City	Annual Heating Degree Days	Annual Cooling Degree Days
Athens	2536	1411
Atlanta	2475	1403
Augusta	2244	1660
Columbus	2142	1555
Moultrie	1298	2230
Savannah	1388	2208

Source: Georgia Automated Environmental Monitoring Network
January 1, 2023 to December 31, 2023.

V.5 Type of Weatherization Work to Be Done

V.5.1 Technical Guides and Materials

Georgia subgrantees must perform all work according to the National Renewable Energy Laboratory (NREL) Standard Work Specifications (SWS) and the State of Georgia Weatherization Field Guide to promote and support high quality work for the Georgia weatherization network. The subgrantee's signature on the WAP contract documents will serve as verification that work will be performed in accordance with NREL SWS specifications of work quality outlined in WPN 22-4, Section 2.

Georgia weatherization work will be performed in accordance with U.S. Depatment of Energy (DOE) - approved energy audit procedures and materials listed in 10 CFR 440 Appendix A.

Variances are created depending upon the needs of the Georgia WAP program in accordance with the Field Guide. Proposed variances are presented to the subgrantees during the monthly T&TA conference calls for review. GEFA reviews variances internally and, if approved, submits the variances request to DOE.

GEFA's process for dealing with a quality control inspector (QCI) that fails to adequately monitor and inspect the work in accordance with the recently

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approved Field Guide is outlined and uploaded to this plan.

GEFA provided a link to all subgrantees to download the Field Guide and required a sign and acknowledgement form for the subgrantees on the Field Guides, WAP Policy and Procedures Manual, Audit Policy and Procedures Manual and QCI forms.

Communication of guidelines and standards.

GEFA will ensure that all subgrantee contracts and subgrantee vendor contracts contain language that clearly documents the following:

- That the state is implementing work quality standards that align with the Field Guide.
- That all subgrantee staff, contractors and anyone doing the actual work have access to the Field Guide.
- That every home is inspected and complies with the Field Guide.

The subgrantee contract language has been updated to specifically include adherence to the WAP, approved audit tool, Weatherization Field Guide, WAP Policy and Procedures Manual, Energy Audit Policies and Procedures Manual, and Health and Safety Plan. The WAP Policy and Procedures Manual will include sections for quality work standards, inspection compliance and QCI qualifications, training requirements, and certifications. By signing the GEFA contract, subgrantees are acknowledging receipt of all technical manuals, policies and protocols. GEFA has loaded the Field Guides, WAP Policy and Procedures Manual, Energy Audit Policy and Procedures Manual, and Health and Safety Plan to the WAP. These resources can be found on GEFA's website www.gefa.georgia.gov.

GEFA requires a NEAT or MHEA audit in WA10 on every unit for agencies that are not utilizing a priority list. GEFA submitted all required documentation and NEAT/MHEA audits to DOE in August 2017 and July 2018. GEFA has contracted with Southface and CHP to conduct three NEAT/MHEA audit training sessions over the last several years.

Field guide types approval dates

Single-Family:	
Manufactured Housing:	
Multi-Family:	

V.5.2 Energy Audit Procedures

Audit Procedures and Dates Most Recently Approved by DOE

Audit Procedure: Single-Family
Audit Name: Other (specify)
Georgia Weatherization Assistance Program, National Energy Audit Tool (NEAT) submitted for Energy Audit Procedure Approval March 15 2017; revised and resubmitted on August, 2017; Final Approval received in August 2021.
Approval Date:

Audit Procedure: Manufactured Housing
Audit Name: Other (specify)
Georgia Weatherization Assistance Program, Manufactured Home Energy Audit (MHEA), submitted for Energy Audit Procedure Approval April, 2012; revised and resubmitted on August 25, 2017; Final Approval received in August 2021.
Approval Date:

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

Comments

Energy audits and inspections.

Georgia uses the Weatherization Assistant software, which includes the National Energy Audit Tool (NEAT) and Manufactured Home Energy Audit (MHEA),

to assess all single family and manufactured homes. All refrigerator replacements must show documentation in the client file that the appliance was metered for at least two hours and the savings-to-investment ratio (SIR) is equal to or greater than one.

For single family and manufactured homes, work shall be done according to the audit's recommended energy conservation measures (ECM). It is the responsibility of the subgrantee's energy auditor to assess the existing conditions of the dwelling unit/structure and record the information. An energy audit must be completed before the commencement of any work. The energy audit must include each of the following diagnostic measures:

- Blower door test for air infiltration/exfiltration
- Combustion safety testing
- ASHRAE 62.2
- Test efficiency of heating distribution system and related controls
- Moisture problems; inspect for presence of mold or mildew
- Inspect for potential lead-based paint hazards
- Determine condition and effectiveness of previous weatherization measures, if any
- Conduct indoor air quality tests where applicable
- Assess overall condition of structure, including the proper identification of the building envelope
- Evaluate client HVAC system usage/operation
- Assess adequacy of ventilation/venting systems
- Pressure pan testing/duct testing
- Conduct base load usage analysis
- Determine existence of any other health and safety issues
- Other energy related measures.

Other energy related measures.

GEFA allows subgrantees flexibility in determining work scopes, to enable a more comprehensive approach to serving low-income clients. Certain repairs may be completed in the course of providing WAP assistance. However, subgrantees are reminded that the overall goals of the WAP are to reduce energy use, and heating, and cooling costs by improving energy efficiency and ensuring health and safety. All repairs provided under the program must be incidental and consistent with the mission of the program. The following energy related repairs may be permitted, when necessary:

- Ventilation may be installed in situations where it is necessary to mitigate health and safety or moisture problems encountered in a dwelling unit being weatherized, including proper ventilation of combustion appliances.
- Heating and cooling system repair or replacement is permitted when shown to increase efficiency or useful life of the system or provide for the proper distribution of heat to occupied areas. Replacement must be based on health and safety and/or NEAT/MHEA justified (ECM) with (SIR) of one (1.0) or above.
- Chimneys may be relined or repaired when the existing chimney condition creates an unsafe or inefficient condition during the operation of the primary heating appliance. In situations where an existing chimney is inadequate for the proper venting of combustion appliances other than the primary heating appliance, alternative cost effective methods of venting those appliances should be explored and the most cost effective measure must be used.
- Hardwired lighting fixtures may be replaced to accommodate more energy-efficient lighting or when existing fixtures are unsafe.
- Ground fault circuit interrupters (GFCI) may only be installed in areas where one is required to ensure safe installation of an ECM measure.
- A roof may be repaired as an (IRM) only when this work is necessary to protect insulation that has previously been installed or is proposed as part of the work scope for the unit.
- Electrical circuits may be upgraded as an incidental repair measure (IRM) only when it is necessary in conjunction with the installation of a weatherization measure. For example, the installation of a new heating appliance, or ventilation appliance requires a circuit that is not currently present or adequate.

V.5.3 Final Inspection

General policy

The Georgia WAP, approved audit tool, Field Guide as aligned with the National Renewable Energy Laboratory's Standard Work Specification, WAP Policy and Procedures Manual, Energy Audit Policy and Procedures Manual, and Health and Safety Plan shall apply to the subgrantees and their subcontractors.

The duties of the subgrantee in sections IV through IX of this exhibit shall apply to the subgrantee's subcontractors, and subgrantees shall cause the requirements therein to be made a part of appropriate contracts, subcontracts, and agreements entered into by the subgrantee and subcontractor.

These regulatory documents are not intended to abridge safety, health, environmental, or local codes or other ordinances. In such circumstances where there are

conflicts, the local codes or ordinances shall apply.

Specifications

The contractor shall perform work in accordance with applicable program specifications defined in the Field Guide as aligned with the National Renewable Energy Laboratory's Standard Work Specifications, WAP Policy and Procedures Manual, Energy Audit Policy and Procedures Manual, and Health and Safety Plan.

Inspection and monitoring of work using guidelines and standards.

DOE requires that Quality Control Inspectors (QCI) working for the WAP possess the knowledge, skills and abilities in the National Renewable Energy Laboratory (NREL) Job Task Analysis for QCI. This requirement applies to all individuals who perform an evaluation and approve work performed in homes including final inspectors and state monitoring staff.

GEFA will ensure that QCI competency is demonstrated by mandating certification as a Home Energy Professional (QCI). GEFA requires that each state program monitor become certified as a QCI. Each subgrantee will employ or contract with a certified Home Energy Professional QCI. Because GEFA is ultimately responsible for ensuring that every unit reported to DOE meets the work quality guidelines required by the Quality Work Plan, subgrantees must submit the credentials of all staff employed as a QCI and of any third- party organizations engaged to conduct quality control inspections. Each subgrantee will nominate the individual selected to be their QCI and register them with the state.

GEFA will implement policies and procedures to address situations when the QCI is not inspecting units using the standards adopted by the state and consistent with the Field Guide. This policy will include remedial action that may result in the denial of the unit for reimbursement until the final inspection is conducted by a QCI and additional monitoring to ensure that state protocols are consistently followed.

GEFA may require the QCI to take additional training or may deliver on-site training to the QCI to ensure all work is consistent with the Field Guide. If, after attempts at training and remediation have failed to improve the performance of the QCI, then GEFA has the authority to remove the QCI from the network that is not performing work according to the Field Guide. Additionally, the subgrantee risks the state reducing their funding allocation and using the funds to hire a third- party QCI or having funds reallocated to another subgrantee.

Quality Control Inspection.

GEFA will require that every DOE WAP unit reported as a completed unit must receive a final inspection by a certified QCI, ensuring that all work meets the minimum specifications outlined in the Field Guide in accordance with 10 CFR 440.

- Units will be inspected using criteria found in the specification outlined in the Field Guide.
- Every client file will have a QCI form that certifies that the unit had a final inspection and that all work met the required standards. The certification will be by a certified QCI. Signatures will meet the requirement. If a unit has received a final inspection and has also been monitored by the state, two certification forms will be available in the client file, one for each inspection.
- The QCI certification form will require the QCI certification status and certification number.
- The QCI will include an assessment of the original audit and confirm that the measures called for on the work order were appropriate and in accordance with the state audit procedures and protocols approved by DOE.
- Grantee technical monitoring of Subgrantee dwelling units shall not be completed by the same QCI certified individual that had completed the Subgrantee's energy audit or Final Inspection of the same dwelling unit.

Georgia has elected to implement one of the DOE standard options for administering quality control inspections, Independent Auditor/QCI. The auditor performs the audit, creates the work order, and performs the final quality control inspections. The auditor is not involved in any of the actual work on the home. Each subgrantee must have a certified QCI on staff or must have a third- party certified QCI perform final inspections on each unit prior to submitting it as a completed unit to GEFA.

The GEFA program monitor is required to be certified to perform QCI and the program will perform quality assurance reviews on at least 10 percent of all completed units. To ensure the individual functioning as the QCI is able to consistently perform both tasks, GEFA will develop a quality assurance plan that requires the individual complete the QCI training at an accredited training center and be a certified QCI.

V.6 Weatherization Analysis of Effectiveness

1) Describe how the effectiveness of subgrantee weatherization is assessed:

GEFA uses a tracking database to track and assess subgrantee monitoring results, which is reviewed monthly to track performance and improvements. Subgrantees are ranked 1) at-risk, 2) standard and 3) high-performing. GEFA prioritizes efforts with at-risk subgrantees to get them back to standard classification. GEFA performs monthly desk reviews on every subgrantee to review actual spend and production against planned spend and production. This allows GEFA to review the average cost per unit (ACPU) and work with subgrantees with low ACPU. The desk review allows GEFA to assess subgrantee spend and determine if reallocations within the network are required to meet the state spend goal for the WAP.

2) Describe the development of Training & Technical Assistance activities and priorities:

Training and technical assistance (T&TA) activity is primarily driven by identification of problems and issues in the field and through interviews with the crew and supervisors. Additionally, during the annual network training conference for all weatherization subgrantees, training needs are discussed and a plan developed with input for subgrantees. On-site monitoring, as described in V.8.3 Monitoring Activities, provides ideal conditions during which subgrantees may be evaluated and areas in need of improvement can be identified. If deficiencies are seen in multiple subgrantees, GEFA may require mandatory network training. For example, to better assist agencies with NEAT/MHEA audits, GEFA has held an IREC, CHP for a four-day mandatory training course for all subgrantees on NEAT/MHEA with a final test out.

3) How the grantee is incorporating monitoring feedback and training needs are being assessed:

In addition to the formal monitoring that tracks deficiencies and findings and outlines how to make improvements, monitoring visits allow for a comprehensive review of the subgrantee. On-site monitoring of at least 10 percent of completed homes includes a thorough client interview to determine outcomes, crew behavior, energy use reduction and overall impressions. Such review may include technical and financial systems and procedures, follow- up on previous training outcomes, identification of future training needs, and the sharing of best practices at all levels of operation.

4) How is GEFA tracking Subgrantee performance?

Monthly budgetary reviews enable the grantee to analyze subgrantee performance and productivity. GEFA uses a tracking sheet in to monitor spend and unit production by subgrantee and by contract. This is updated by a GEFA program manager every month. If production and/or expenditures are deemed insufficient, GEFA may recapture and redistribute funds to other subgrantees that meet or exceed production and quality work standards, without having a public hearing. GEFA offers assistance, as resources allow, to help subgrantees increase production to successful performance levels. This assistance may include special technical or administrative training of the subgrantee's staff.

5) What are the management mechanisms in place to affect improvement?

In an effort to make improvements, GEFA conducts monthly T&TA calls with its subgrantees. that include monitoring deficiency trends, training opportunities, DOE updates and production and spend data. If a subgrantee is behind or having trouble, we hope that other subgrantees might be able to offer assistance. GEFA also actively reallocates funds from subgrantees behind on spend and production to standard or high- performing subgrantees exceeding spend and production. Each subgrantee is to use the pre - and post - weatherization pictures to verify conditions at the time of final inspection for each dwelling unit. Each final inspection is to have pictures included as a representative sample of the major work that has been performed on the unit. The pictures are to be included with every client file that has had a completed final inspection. In order to calculate the most accurate energy savings, subgrantees are required, when possible, to obtain 12 months prior energy of metered energy sources for each unit to be weatherized. Each subgrantee will be asked to collect success stories that have occurred throughout the program year. GEFA is constantly exploring ways to make the program more accountable and to adopt systems that improve service delivery.

V.7 Health and Safety

GEFA does not allow partial weatherization on homes. Anything on a case-by-case basis must receive prior approval from GEFA to proceed. GEFA will determine if the work proposed is allowable, allocable, and reasonable and delivers on the main intent of energy conservation. In accordance with WPN 22-7, GEFA will adopt the following approach to implementing health and safety measures:

- Subgrantees shall comply with all applicable state and local building codes and regulations.
- GEFA provides its subgrantees with an allocation of funds, identified as a budget line item, to be used for required health and safety measures. Specific health and safety related measures are reported in Hancock. The purchase and maintenance of personal protective equipment and other safety equipment is allowed. Each subgrantee has a training and technical assistance budget, and those funds may be used to provide training and certifications to address health and safety issues.
- Georgia will budget 25 percent of DOE funds for health and safety measures.
- Georgia tracks health and safety labor and material costs on the subgrantees work orders and invoices.

- Reporting data that populates the statewide database to track and manage all health and safety costs.
- GEFA encourages subgrantees to maintain coverage for pollution occurrence insurance (POI), but no longer makes it mandatory.

For further details on the applicable health and safety standards, please see the Georgia Health & Safety Plan in compliance with WPN 22-7 attached to this application.

V.8 Program Management

V.8.1 Overview and Organization

The Georgia Environmental Finance Authority (GEFA), Energy Resources Division (ERD) administers the WAP. GEFA is the central coordinating unit for the energy programs within the state of Georgia. GEFA administers the following programs:

- Water and Sewer Financing
- Land Conservation Financing
- Weatherization Assistance Program
- Fuel Storage Tank Program
- State Energy Program
- Energy Performance Contracting

Hunter Hill serves as GEFA's executive director and the ERD director is Kristofor Anderson. The WAP has four full-time staff members: two project managers, one lead project manager and one project manager/monitor. A project manager is responsible for drafting the annual WAP application, budget preparation and analysis, desk and program monitoring, spend and production tracking, contract and amendment execution, annual conference and training planning, quarterly reporting and general administration of the program. The program manager reviews requests from subgrantees that require prior written approvals or state approvals.

The program manager/monitor is responsible for program compliance as directed by 10 CFR 440 and ensuring subgrantees comply with the Georgia WAP Policy and Procedures Manual, Georgia Weatherization Field Guide, Energy Audit Policy and Procedures Manual, Health and Safety Plans, and WPNs. The program manager/monitor conducts required on-site technical monitoring, provides technical assistance to resolve complaints and disputes, manages the training requirements for staff and subgrantees, and reports success stories.

The other program manager is responsible for drafting contracts and amendments, reviewing and processing all subgrantee invoices, and assisting subgrantees with inquiries and budget modifications as needed in Hancock. The program manager also tracks all subgrantee insurance and required subcontractor documentation.

All persons associated with the program use the state rules and regulations concerning travel.

The WAP will be administered by GEFA, which will be considered the grantee. The WAP is directly administered by the division director and program managers. Currently GEFA has 14 direct contracts with community action agencies to implement the WAP. These subgrantees will ensure that WAP services are available in all 159 of Georgia's counties. Additionally, an established number of units are to be completed on a county-by-county basis. Subgrantees are solely responsible for the quality of work and reporting requirements of the WAP. Subgrantees are expected to monitor the performance of contractors, crews, and nonprofit partners carrying out work for the WAP. Additionally, GEFA contractors and/or GEFA monitors will visit all Georgia subgrantees and review no less than 10 percent of completed units (see V.8.3 Monitoring Activities for additional details).

V.8.2 Administrative Expenditure Limits

GEFA will follow the rules for administrative expenditure limits outlined in 10 CFR 440.18 (e), which states that not more than 15 percent of any grant made to a state may be used by the grantee and subgrantees for administrative purposes in carrying out duties under this part, except that not more than 7.5 percent may be used by the state for such purposes, and not less than 7.5 percent must be made available to subgrantees by states. DOE includes the provision where a Grantee may provide in its annual plan an additional 5 percent for administration for recipients of grants of less than $350,000. The grantee must determine that such recipient requires the additional amount to implement effectively DOE's administrative requirements.

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Weatherization Assistance Program (WAP)
STATE PLAN / MASTER FILE WORKSHEET
Grant Number: SE0001817, **State:** GA, **Program Year:** 2026
Recipient: Georgia Environmental Finance Authority

V.8.3 Monitoring Activities

Please see section V.5.3 Final Inspection under Quality Control Inspection (QCI) for the detail on the QCI policy.

Georgia has elected to implement one of the DOE standard options for the administering quality control inspections - Independent Auditor/QCI. The auditor performs the audit, creates the work order, and performs the final quality control inspections. The auditor will not be involved in any of the actual work on the home. Each subgrantee must have a certified QCI on staff or must have a third-party certified QCI perform final inspections on each unit delivered as a completed unit to GEFA. The GEFA contractor or GEFA QCI will perform quality assurance reviews on at least 10 percent of all completed units.

In accordance with 10 CFR 440 and WPN 20-4, GEFA, as the grantee of the DOE WAP, has an established monitoring system for evaluating subgrantee performance regardless of funding source. Monitoring functions will be the state's principal method for determine subgrantee compliance with the regulations contained in 10 CFR 440, applicable OMB circulars, DOE Assistance Rule 2 CFR 200, Weatherization Program Notices and any other procedures that DOE may issue. Additionally, monitoring activities will ensure the evaluation of actual accomplishments against planned activities and determining the effectiveness of WAP policy. Monitoring also provides objective reporting to and from subgrantees and makes recommendations to address program and administrative deficiencies and needs. Approximately 70 percent of the 2026-2027 grantee training and technical Assistance (T&TA) funds will be allocated for salaries and contracts associated with program management and oversight through desk, administrative, technical, and fiscal monitoring conducted by state staff and third-party contracted monitoring. Please see details below for salary percentages charged to the T&TA budget.

Any remaining T&TA budget will be used for on-site training, mandatory training, and trainers or passed down to subgrantees for pre-approved individual T&TA activities. Additional funding sources will be used to leverage T&TA or monitoring activities as needed. To fulfill this requirement, GEFA will conduct comprehensive monitoring of each subgrantee at least once a year using the following approach. Each subgrantee will be visited by a technical field representative to review completed units for program compliance. Each subgrantee may be visited by a fiscal/administrative representative annually and undergo desk monitoring by programmatic staff. Program year is defined as April 1 through March 31. The WAP staff that will participate in the monitoring process include the following:

WAP Staff	Monitoring Activity
Division Director	Monthly review and approval of subgrantee invoices, personnel management, and monitoring compliance.
Program Manager	Monthly review of subgrantee program management, fiscal procedures, contractual compliance, staffing and organization, procurement, and client services.
Program Manager	Monthly review of invoices, fiscal procedures, production benchmarks, program policy compliance, procurement, and client services.
Program Manager/Monitor	Monthly review of program management, inventory, materials quality and field work, quality assurance monitoring, in-progress unit monitoring, training and technical standards compliance.
GEFA Fiscal Support	Administrative/fiscal review that is primarily concerned with the contractual, administrative, and accounting aspects of the program.

A tentative monitoring schedule for the 2026-2027 program year follows:

There are 14 subgrantees to be monitored by the 2 Program Managers. Each Program Manager is responsible for 7 subgrantees:

Quarter 2- 4 subgrantees will be monitored

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Quarter 3- 6 subgrantees will be monitored

Quarter 4 - 4 subgrantees will be monitored

Monitoring reports are to be completed within 30 days of the visit to the subgrantee. These reports will summarize any findings and when necessary, direct the subgrantee to take specific actions to correct issues of noncompliance and/or to develop a plan of action to improve performance. Reports are sent to subgrantee board chairpersons, executive directors and the weatherization coordinator, who must respond within 30 days and provide evidence or assurance, as appropriate, of all actions taken. A 15-day extension is allowable with permission from GEFA.

The steps outlined in the GEFA Monitoring Tool will be followed regarding the reports and any possible follow-up actions. Monitoring reports include a reminder that suspension of funding is possible if a subgrantee fails to respond within the allowed time frame. Georgia's monitoring approach will include the following components:

- A monthly desk review for each subgrantee. Budget category expenditures and completion rates will be compared to planned rates (as outlined in DOE grant application request). Minimum and maximum cost averages for total dwelling, regular weatherization, and health and safety expenditures will be monitored for compliance with WAP guidelines and contract limitations. Materials, labor and program support cost averages will be monitored to ensure they are maintained at acceptable program levels. Additionally, GEFA weatherization staff will review invoices for timeliness of submission and compliance with Weatherization program policy.
- In an effort to validate compliance, GEFA staff will perform impromptu checks of subgrantee weatherization programs to ensure a continual high-performance level on the part of weatherization staff. During these visits, client files and on-site reviews will be conducted to capture the subgrantee’s day-to-day activities.
- Administrative/fiscal review by from the GEFA fiscal team. This review is primarily concerned with the contractual, administrative, and accounting aspects of the program operations and does not include a field review. GEFA fiscal staff schedule the reviews independently based on GEFA accounting procedures, and while some areas will overlap, this form of monitoring is not the same as a monitoring visit based largely on field work evaluation.

The following areas will be the primary focus of the administrative/fiscal review:

- A review of subgrantee's A133 audit each year.
- Review of procurement procedures to comply with 2 CFR 200.
- The cost or purchase and delivery of weatherization materials (10 CFR 440.18(2(1). Funds may only be expended on weatherization materials in Appendix A of 10 CFR 440 or as approved by DOE.
- Labor costs in accordance with 10 CFR 440.19.
- Purchase or annual lease of tools, equipment and/or vehicles, except that any purchase of vehicles must be referred to DOE for prior approval in every instance (10 CFR 440.18(d) (6)).
- The costs of incidental repairs to make the installation of weatherization materials effective (10 CFR 440.18(d) (9)).
- The costs of liability insurance for weatherization projects for personal injury and property damage (10 CFR 440.18(d) (10)).
- The cost of carrying out low cost/no cost weatherization assistance (10 CFR 440.20).
- The cost of WAP financial audits in accordance with 10 CFR 440.23.
- Administrative costs (10 CFR 440.18(d) (13)).
- The costs of eliminating health hazards necessary to ensure the safe installation of weatherization materials (10 CFR 440.18(d) (15)).

Technical Monitoring: GEFA has the responsibility for on-site monitoring of all WAP subgrantees. The weatherization staff's monitoring activities include:

- Monitoring 10 percent of the statewide completed units. (e.g.300 DOE units are completed, GEFA will monitor at least 30). GEFA has a planned monitoring schedule and reviews spend and production monthly to align monitoring with actual production.
- Please see the attached Monitoring Protocol document for details on eligibility, rental, field work, and client file data.
- Inspecting a sample of the dwellings completed by the subgrantee for each funding source.
- Reviewing client files of dwellings inspected.
- Reviewing program operations to ensure proper administration of allocated funds.
- Evaluating subgrantees for achieving performance standards based on criteria set forth by GEFA.
- Determining training and technical assistance needs to ensure Tier I and Tier II training requirements are met.
- Verifying training certification status and retaining training certificates.

Phase I:

- A GEFA representative will notify the subgrantee of upcoming monitoring visit and make available all the necessary forms for completion.
- The subgrantee will supply the GEFA representative a list of completed projects for the period to be monitored.
- The subgrantee will complete and return the monitoring questionnaire by a pre-determined date.

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Phase II:

- GEFA will work with the subgrantee and use Hancock software to select the units to be inspected.
- The GEFA representative will select on-site files to be reviewed.

Phase III:

- On-site monitoring will attempt to focus on inspections, since desk monitoring will satisfy most administrative reviews, including financial examination. A key component of on-site monitoring will be to provide timely training and technical assistance.
- Combustion safety monitoring will be performed on-site. Units that are completed or in-progress will be monitored. Workers, assessors, and inspectors and all combustion safety related work will be specifically reviewed for program adherence to all combustion safety related guidance, guidelines, and standards.
- Diagnostic testing is performed, including blower-door tests, combustion safety tests, and pressure differential tests. The test results are compared with those noted in the client file.
- Client interviews will be performed to assess worker behavior, workmanship and client satisfaction.
- Inspection of completed units, with the subgrantee auditor/inspector, provides an opportunity to provide on-site training and technical assistance. Various installation techniques, quality control issues or test procedures may be discussed.
- The set-up values of the NEAT/MHEA audit tool are checked to ensure they are current and accurate, that subgrantee staff is proficient in the use of the tool, and that the audit tool is used as directed by GEFA.
- Exemplary practices, successful approaches, or creative ideas in the operation of the local program will be identified and noted.
- Crew health and safety procedures will be checked for compliance with the Health and Safety Plan.
- An exit interview with the subgrantee's executive director, weatherization director/coordinator, and other appropriate staff will be held at the conclusion of the monitoring visit to present and discuss preliminary findings, observations and recommendations.
- A final written monitoring report to the subgrantee will be issued within 30 days of completed monitoring visit. The report will contain a description of the monitor's findings, observations and recommendations for corrective action. The subgrantee will submit a written response within 30 days of the receipt of the monitoring report, providing assurance that identified problems are resolved in a timely manner and documented.
- The executive director's signing and returning the monitoring report indicates the subgrantee's acceptance of the report.
- The response will be reviewed by GEFA and a letter from the weatherization program manager of acceptance or explanation will be sent.
- Should any issues be unresolved, they will be addressed in a subsequent monitoring visit.

Appeals

Should a subgrantee wish to appeal in the monitoring report, the subgrantee may submit their request in writing to the state's weatherization program manager/monitor. The appeal should be sent within 30 days of receipt of the monitoring report. GEFA will review and respond within 15 days of the receipt of the appeal. Any subgrantee that does not agree with the initial outcome of the monitoring report appeal may submit a subsequent appeal to the GEFA's executive director.

The subgrantees are also subject to visits from DOE, U.S. Department of Health and Human Services and the Georgia Department of Human Services.

GEFA's executive director may suspend or terminate a contract with a weatherization subgrantee at any time for any cause. For cause shall mean, at minimum, a finding of non-compliance with the procedures established by this section. In case of subgrantee failure to comply substantially with the provisions of the Energy Conservation in Existing Building Act of 1976 or of 10 CFR, Part 440, GEFA, may take immediate steps to suspend or terminate the contract with that subgrantee. Cause for suspension or termination of contracts shall include:

1. Failure to maintain adequate fiscal controls and accounting procedures.
2. Filing late or inaccurate financial and programmatic reports.
3. Misuse of program funds.
4. Inability of the subgrantee to account for all materials and equipment purchased.
5. Failure to adhere to the schedule for goals and objectives established.
6. Provision of weatherization services, which are not done in a quality manner.
7. Failure to use weatherization materials that meet or exceed federal specifications.
8. Failure of a subgrantee to comply with the terms of a contract.
9. Failure to comply with audit requirements.
10. Failure to comply with required procedures.
11. Discrimination of employees.
12. If a project or program is supported over two or more funding periods, suspension or termination may occur due to the failure to submit required reports still due from the prior period.

Spend and Production Goals: GEFA will require a spend and production plan be completed for each new contract to ensure the minimum units defined in each

contract were delivered and that subgrantees meet the 99 percent spend goal established for the Georgia WAP network. The spend and production plan will be signed by the executive director and GEFA's program manager. Subgrantee WAP coordinators/directors must review the spend and production plans with their executive directors following the monthly invoicing and if there is a variance from the plan, they should reach out to a GEFA program manager. A subgrantee's failure to meet spend and production goals on two contracts in a 12 month period may result in reduction or termination of funding and removal from the WAP program. GEFA will review the subgrantee's productivity in relation to the established production goals and/or quality of the subgrantee's work on a monthly basis and based upon the subgrantee's specific and performance circumstances, GEFA will take these actions:

- Allow the subgrantee to continue operations at the existing funding level and thereafter conduct more frequent performance review.
- Reduce the funding level for the subgrantee and provide unexpended allocated dollars and service territory to another subgrantee.
- Require the subgrantee to select a non-profit delegate in cooperation and with assistance from GEFA to meet production goals in a specified time frame.
- Reduce the funding to the subgrantee and provide the dollars on a competitive basis to a qualified non-profit to service the defined geographic territory.
- Provide additional funding at a level that can be expended within the grant period, to subgrantees exceeding production and/or meeting quality work standards.

Based on production levels and/or quality of work after the six month in the contract term, GEFA may also take one or more of these actions for reallocation of funds:

- Reduce the funding level for the subgrantee and provide additional funding to subgrantees meeting or exceeding production at GEFA's discretion.
- Allow subgrantee to retain existing grant dollars if the funds can be expended and production met within a specified timeframe.
- Offer grant dollars on a competitive basis to a qualified non-profit willing to serve those geographic areas where the production goal is not being met or work quality is not up to standards.

On-site monitoring of a selected number of completed units will be performed by GEFA on an ongoing basis to ensure that weatherization program standards are met. In addition, GEFA may conduct satisfaction surveys to recipient households to ensure that local programs are effective and customer-friendly. Results from the surveys are published in the monitoring report. GEFA will reserve the right to reduce or add subgrantee funding and add providers to ensure that WAP dollars received by the state of Georgia are effectively expended within the time frame required by DOE.

Should any of the subgrantees that are identified in this plan cease to administer WAP during the year covered by this plan for any reason, GEFA will work with existing WAP subgrantees to provide for that service area and will not require a public hearing. If a new subgrantee is required to be added to the network to provide coverage for the service area, a public hearing will be held. According to the Weatherization Program Notice 02-1 and 10 CFR Part 440, states are reminded that Community Action Agencies are given preference.

V.8.4 Training and Technical Assistance Approach and Activities

Training and Technical Assistance Plan:
GEFA's training plan will follow DOE memorandum 22-4 to include comprehensive and specific training categories and will meet the National Renewable Energy Laboratory (NREL) Job Task Analysis (JTA) for which the worker is employed. Subgrantees are encouraged to re-certify their weatherization workers in accordance with this training plan, as needed, and at least six months prior to the expiration of the individuals' certification date to ensure an adequate supply of energy auditors and quality control inspectors (QCI), as well as all other occupational specialties requiring certification.

The major objective of training and technical assistance (T&TA) is to provide subgrantees with the information and training required to administer and operate in compliance with DOE and State rules and regulations. The majority of the subgrantees are anticipated to have at least one energy auditor and one QCI on staff, but some may contract with an independent energy auditor or QCI contractor and others may use shared energy auditor and/or QCI resources from other subgrantees.

Comprehensive Training:
Comprehensive, occupation-specific training follows a curriculum aligned with the JTA for that occupation. Tier 1 training must be administered by, or in cooperation with, a training program that is accredited by a DOE-approved accreditation organization for the JTA being taught.

Comprehensive Training Providers:
Several Tier 1 Interstate Renewable Energy Council (IREC) accredited training providers are located throughout the country and Tier 1 training is provided throughout the year, dependent upon the training providers' schedule. Subgrantees are reminded that any out- of- state training activities must be approved in advance by GEFA.

Comprehensive training courses including but not limited to:

Home Energy Professional – crew leader, regular training every five years
Home Energy Professional – retrofit installer, training within first six months of hire
Home Energy Professional – energy auditor, must have certification to perform audits or be an auditor- in- training

Home Energy Professional – quality control inspector, must have certification to perform inspections

Specific Training:
Single-issue, short-term, training addresses acute deficiencies in the field, such as combustion safety training, audit training, ASHRAE 62.2, etc. Conference training is included in this category.

Specific- Training Providers:
In addition to IREC accredited Tier 1 training providers, several non-IREC accredited training providers are located throughout the state/country (i.e. state, regional and/or nation meetings/conferences; technical colleges; other for/nonprofit organizations; etc). Tier 2 training courses are provided throughout the year, dependent upon the individual training providers' schedule. Subgrantees are reminded that any out- of -state training activities must be approved in advance by GEFA.

GEFA conducts mandatory periodic T&TA conference calls or webinars with subgrantees to address issues found through technical, programmatic, and fiscal monitoring. GEFA reviews new program guidance from DOE during these calls and shares information from national training conferences.

Specific training courses including but not limited to:

ASHRAE 62.2 - residential ventilation
Blower door & duct testing
Combustion safety testing
CPR & standard First Aid
Dense pack walls
HVAC fundamentals
Lead-Safe Certification
Manufactured housing - fundamentals
NEAT/MHEA
OSHA 10/30 - construction
Weatherization program management

Client education

Refrigerant Disposal

Assessment of training and technical assistance (T&TA) needs:

GEFA believes that strong internal systems, oversight, and T&TA are all essential to enable subgrantees to achieve the objectives of the weatherization program. The T&TA budget and narrative reflects this philosophy and will ensure quality weatherization work and adequate financial and programmatic management controls. The purpose of all T&TA will be to maximize energy savings, improve program and operational efficiency, improve crew/contractor work quality, reduce the potential for waste, fraud, abuse and mismanagement, and increase client satisfaction.

T&TA funding is used to pay salary, travel, and operational costs for GEFA staff and contractors to provide monitoring and T&TA to subgrantees and contractor staff. Subgrantee expenses for participation in T&TA activities will be funded from DOE T&TA and other funds. GEFA will use the following methods to provide T&TA, including but not limited to:

1. GEFA staff or contractor(s) will provide on-or off-site T&TA as needed. Needs may be identified by the subgrantee staff, DOE project officer monitoring visits, internal state audits, Inspector General reports, or by GEFA staff as a result of observation for resolution of problems, or to meet updates required by DOE.
2. On-site visits monitoring provide firsthand, observable evidence for T&TA; therefore, through monitoring, GEFA staff will analyze data on a variety of financial, production, and weatherization retrofit information. Trends indicating extreme highs/lows in production or issues with weatherization measures will be noted and tracked for appropriate follow-up. Technical weatherization skills will be closely monitored and any deficiencies will be shared with subgrantees and specific training requirements will be mandated. In addition to the on-site assessment of subgrantee training needs, the GEFA program manager/monitor reviews the state list of energy auditor and QCI certifications.
3. Subgrantees will have the opportunity to identify and address their own T&TA needs through local initiatives.
4. Georgia requires energy auditor training and certification for all energy auditors.
5. Georgia requires QCI training and certification for all inspectors.

6. For current certified staff, use of continuing education credits to maintain certification will be funded through T&TA funds. GEFA allocates T&TA funds to each subgrantee for mandated training, as needed.
7. GEFA management and subgrantee staff will attend DOE mandated activities/events, NASCSP events, state weatherization managers' meetings, national DOE conferences, and other staff development trainings as needed or required.
8. The annual Georgia weatherization training conference includes fiscal, programmatic, and technical training modules and is a mandatory T&TA activity.

Provision of training and technical assistance.

1. On-site technical assistance visits will be conducted by GEFA field and desk monitoring staff, as requested or required. Any subgrantees experiencing management, production, operational, or compliance problems will be provided technical assistance and a plan of recommended corrective action. Verbal recommendations will be given to the executive director, weatherization director, or weatherization coordinator prior to the end of the visit. A letter or a monitoring report reiterating those recommendations will be sent within 15 days of the visit and a follow-up visit will be made to evaluate progress.
2. Subgrantees will have the opportunity to select a training provider for meeting the training needs recommended and mandated by GEFA. Subgrantees must have GEFA approval for all out-of- state training and travel costs. It is strongly recommended that subgrantees use local/in-state training resources to maximize their T&TA funds.
3. Should a subgrantee hire a new weatherization director/coordinator, the subgrantee is required to notify GEFA in writing within 30 days of the date of hire and request training. GEFA will contact the subgrantee within 30 days of receipt of notification to arrange for training and develop a training plan. GEFA will use in-house staff, accredited training providers, and/or other weatherization professionals to provide training.
4. Subgrantees may use T&TA funds to support locally initiated training and to make effective use of the state training center. To assure coordination of training activities, all subgrantee T&TA funds shall be itemized and budgeted into the following categories:
    a. Costs for travel and per diem for attendance at all GEFA -hosted T&TA workshops, seminars, meetings, or classes.
    b. Supplemental training not offered by GEFA for subgrantee staff training must relate directly to the attendee's WAP job duties.
    c. Purchase of training materials, including training and testing costs, necessary to meet DOE regulations.
    d. Percentage of salary for a staff person responsible for ensuring that training, safety requirements and needs are met, and to oversee in-house weatherization training.
5. To assure coordination of training activities, all grantee T&TA funds shall be itemized and budgeted into the following categories:
    a. Purchase of training materials, including training and testing costs, necessary to meet DOE regulations.
    b. Travel for GEFA staff to attend conferences, meetings, training, and seminars.
    c. Other T&TA initiatives in conjunction with local T&TA programs.
6. GEFA shall continue to assure an effective exchange of program information through:
    a. Active involvement with the WAP Policy Advisory Council (PAC).
    b. Promotion of statewide meetings initiated by representatives of the PAC at which management, technical and general informational topics will be discussed according to current need.
    c. Scheduling statewide weatherization meetings to develop new training approaches and refine the existing courses to best meet the needs of the subgrantee.
    d. Updates to program management guidance, including operations memos, information updates, and revisions in the WAP Policy and Procedures Manual, when necessary.
    e. Encouragement of information exchange and skills transfer among subgrantees on an informal basis.

Assessment of state T&TA activities.

Effectiveness of T&TA activities will be evaluated through the following;

- Local training activities and T&TA expenditure reports
- Quarterly review of the GEFA training tracking database to measure and track training efficiency
- On-site monitoring and observations and reporting of improvement in work standards
- Review of local T&TA curriculum and activities
- Formal evaluation forms completed by participants to statewide training workshops
- Surveys to subgrantees and contractors.

GEFA plans to develop a master workbook for the network to include administrative and financial duties. The workbook will serve as a guide of specific administrative and financial duties conducive of weatherization. After the workbook is completed, the program managers will conduct a training (in person or remote) or host a webinar to cover these specific topics.

Workforce Credentials: All credentials and certifications obtained by Energy Auditors and QCIs are documented within IGEFA and Hancock and required to be maintained in good standing to be allowed to perform assigned work. Subgrantees are responsible for ensuring their contractors hold the necessary licensure to conduct business in local government regions.

GEFA provides training annually to the Georgia weatherization network. additionally, the Georgia state plan requires that all installers begin training within first 6 months of hire. GEFA requires successful completion of its certification training for all auditors and inspectors. The state allocates T&TA funds to each Subrecipient for the mandated trainings as needed. Staff that do not meet the requirements of certification do not have signature authority on assessments or final inspections. Per our Operations Manual, all DOE final units must receive a final inspection by a BPI-certified Quality Control Inspector. Individuals that do not hold BPI-certified QCI are prohibited from conducting final inspections.

Client education has been provided over the years by different methods in each area of the state, ranging from detailed discussions with clients during pre - and post -inspections to providing written educational publications. GEFA will continue to require WAP subgrantees to provide client education to each WAP client. Subgrantees will be required to provide (at a minimum) educational materials in verbal and written format.

Percent of overall trainings

Comprehensive Trainings:	90.0
Specific Trainings:	10.0

Breakdown of T&TA training budget

Percent of budget allocated to Auditor/QCI trainings:	40.0
Percent of budget allocated to Crew/Installer trainings:	50.0
Percent of budget allocated to Management/Financial trainings:	10.0

V.9 Energy Crisis and Disaster Plan

Georgia's ability to leverage additional funds has allowed most providers to meet the emergency demands of their clients without significant changes to the yearly plans. In the event of a declared natural or man-made disaster, Georgia will allow subgrantees to assist their eligible clients with weatherization funds, to the extent that the services are in support of eligible weatherization work and in compliance with Energy Crisis and Disaster Response Plan. The allowable expenditures under the WAP are limited to include the following:

- The cost of incidental/additional repairs to an eligible dwelling unit, if such repairs are necessary to make the installation of weatherization materials effective, per 10 CFR 440.18(d) (9);
- The cost of eliminating health and safety hazards, which is necessary before the installation of weatherization materials per 10 CFR 440.18(d) (l5).

In the event of a declared federal or state disaster (those in which the president or the governor of the state of Georgia has declared the event an emergency), subgrantees may return to a unit previously reported as complete to the Department of Energy that has been damaged by fire, flood, or act of God to be re-weatherized, without regard to date of previous weatherization, per 10 CFR 440.18(f) (2) (ii). Local authorities must deem the dwelling unit salvageable as well as habitable and the damage to the materials must not be covered by insurance or other form of compensation. In these cases, the work can be addressed without prior approval or any special reporting.

The subgrantee may use WAP funds to perform functions to protect the federal funding investment. Such activities may include securing weatherization materials, tools, equipment, weatherization vehicles, or protection of local subgrantee weatherization files and records during the initial phase of the disaster response.

The use of WAP funds to pay weatherization personnel to perform relief work in the community as a result of a disaster is not allowable. The use of weatherization vehicles and/or equipment may be used to assist disaster relief activities, however, the WAP must be reimbursed according to 2 CFR 200. Re-prioritization of households located in a disaster area is permissible as long as the households are eligible for WAP, meet one of the priorities described in 10 CFR 440.16(b), and are free and clear of any insurance claim or other form of compensation resulting from the damage incurred from the disaster.

Weatherization Grantee Health and Safety (H&S) Plan *Optional Template*

1.0 – General Information

Additional information that does not fit neatly in one of the other sections of this document.

Enter Additional H&S Information Here

2.0 – Budgeting

Grantees are encouraged to budget H&S costs as a separate category and, thereby, exclude such costs from the Average Cost Per Unit (ACPU) cost limitation. This separate category also allows these costs to be isolated from energy efficiency costs in program evaluations. H&S costs that are budgeted and reported under the Program Operations category rather than the H&S category, the related H&S costs must be included in the calculation of the ACPU and cost-justified through the Grantee's Department of Energy (DOE)-approved energy audit tool.

Select which option used below.

Separate H&S Budget ☑ Contained in Program Operations ☐

3.0 – H&S Expenditure Limits

Pursuant to 10 CFR 440.16(h), Grantees must establish H&S expenditure limits for their Program and provide justification for those limits by explaining the basis and related historical H&S expenditures. DOE acknowledges that it may be necessary for Grantees to deviate from historical expenditures when certain circumstances arise (e.g. funding source changes).

10 CFR 440.16(h)(2) dictates that these limits must be expressed as a percentage of the ACPU. To calculate this percentage use the following formula:

$$Total\ Average\ H\&S\ Cost\ per\ Unit = \frac{H\&S\ budget\ amount}{Program\ Operations\ budget\ amount}$$

For example, if the ACPU is $5,000 and a Grantee's Program expends an average of $750 per dwelling on energy-related H&S measures, the Total Average H&S Cost per Unit would equal 15 percent. DOE acknowledges that this percentage may vary significantly between Grantees due to different geographical areas and depending upon the availability of other funding sources, resource availability, etc. Low percentages should include a statement of what other funding supports H&S costs, while larger percentages will require greater justification and relevant historical support.

15 percent is not a maximum limit on H&S expenditures. DOE will conduct a secondary level of review on H&S Plans with a Grantee request of more than 15 percent of Program Operations used for H&S purposes. ***DOE strongly encourages using the table below in developing justification for the requested H&S budget amount.*** *In accordance with 10 CFR 440.18(d)(15), these funds are to be expended by the Program in direct weatherization activities, "of which is necessary before, or because of, installation of weatherization materials." This same section of the regulation excludes the H&S costs from the ACPU limitation if H&S costs are budgeted separately.*

DOE recommends reviewing recent budget requests and compare those to actual H&S expenditures to see if previous budget estimates have been accurate. The resulting Total Average H&S Cost per Unit multiplied by the Grantee's production estimate in the Annual File should correlate to the H&S budget amount listed in the Grantee's annual plan.

H&S expenditure limits and justification explaining the basis for setting the limits.

The Health and Safety changes are attributed to the increase of use with Personal Protection Equipment used by subgrantees due to Covid-19. Also, supply chain demands of the network, the strain on resources available, and the rising cost of materials and labor led to the increase of Health and Safety.

Subgrantees may use funds to abate energy-related health and safety hazards only if elimination of such hazards are necessary before, or as a result of, installation of weatherization materials.

2026-2027 Program Year Limits: Related Health and Safety expenditures are limited to 36% of the state's total program operations budget. Subgrantees will be required to obtain prior written approval from GEFA for all health and safety repairs to individual units exceeding $3219

Expenses charged as health and safety measures, do not require cost justification (meeting SIR≥1) and are not to be included as part of the overall job average.
The last full year of Health and Safety reported shows GA spent allocated Health and Safety funds.

Utilizing the spreadsheet embedded below, provide a full list of H&S measures using historical data from your program, including average cost, and frequency rate. If installing more than a single instance of one measure in a unit (e.g. multiple CO alarms), Grantees may aggregate costs so that frequency does not exceed 100%, or enter a justification into the measure column, which explains why that measure has a frequency rate of over 100%. The spreadsheet will auto calculate your expected Total Average H&S Cost per Unit.

Instructions: Double-click icon directly below to open, view and edit Measure Matrix Spreadsheet. Complete the spreadsheet by entering the required information. To save, close the spreadsheet and it will save to this document.

Measure Matrix
Final.xlsx

4.0 – Incidental Repair Measures

Any measures that could potentially be identified as H&S but the Grantee chooses to instead identify and treat those measures as incidental repair measures (IRMs), must be implemented consistently throughout the Grantee's weatherization program. The measure must fit the regulatory definition of an IRM and be cost justified along with the associated energy conservation measure and/or package of measures. 10 CFR 440.3 defines Incidental Repairs as, "those repairs necessary for the effective performance or preservation of weatherization materials."

H&S measures identified and treated as IRMs within your Program.

Such repairs include, but are not limited to framing or repairing windows and doors which could not otherwise be caulked or weather-stripped; providing protective materials, such as paint, used to seal materials installed under this program; sealing minor roof leaks to preserve new attic insulation; repairing water-damaged flooring as part of replacing a water heater; etc.

While repairing a roof to protect the insulation to be installed is allowable, expanding this definition to include roof replacement or for other non-energy related repairs is not a permissible use of DOE funds. If the roof needs replacing the unit should either be referred to a rehabilitation program or the subgrantee must use other funds to cover the costs for this type of work. Roofing repairs are to be charged as incidental repairs and must be included and cost justified in the improvement package of the project.

Incidental repairs must not exceed 10% of the DOE allowable average cost per unit and must be cost justified in the improvement package of the project in accordance with WPN 12-9.

5.0 – Occupant Pre-Existing or Potential Health Conditions and Hazard Identification and Notification Form(s)

Grantees must include policies/procedures for informing clients of the aspects of weatherization that may put a client with pre-existing health conditions at risk during installation of measures. This screening may occur as part of the initial application for weatherization and/or during the energy audit. Procedures must include what steps will be taken and/or available to the client to ensure that weatherization work will not aggravate pre-existing health conditions. Additionally, H&S assessments are required to identify hazards in the home. For those hazards identified, appropriate testing is required when applicable. The client/landlord/property manager must be informed in writing of all testing results, including identification of a hazards revealed by the testing that will lead to deferral/referral.

Grantees are required to develop documentation forms that include at a minimum:

- *Occupant Pre-existing or Potential Health Conditions;*
  - *Screen occupant(s) to self-report known or suspected health concerns either as part of initial application for weatherization, during the energy audit, or other parts of the weatherization process as specified;*
  - *Inform client in writing of any known risks; and*
  - *Provide client with Subgrantee point of contact information in writing so client can inform of any issues.*
- *Hazard Identification Notification Form*
  - *The occupant(s) (and Landlord's, if applicable) name and address;*
  - *Date(s) of the energy audit/assessment and when the occupant(s) (and Landlord, if applicable) was informed of a potential H&S issue;*
  - *A clear description of the problem;*
  - *A statement indicating if, or when weatherization could continue; and*
  - *The occupant(s) (and Landlord's, if applicable) signature(s) indicating that they understand and have been informed of their rights and options.*
- *Radon Informed Consent Form*
  - Provides documentation that the occupant(s) (and landlord if applicable) have been informed of any potential hazards associated with radon in weatherized dwellings. The form must minimally contain the following:
  - An explanation on the potential small risk of increasing radon levels when building tightness is improved. This is based on the results of the Buildings Assessment of Radon Reduction Interventions with Energy retrofits Expansion Study (The BEX Study)
  - A list of precautionary measures WAP will install based on EPA Healthy Indoor Environment Protocols.
  - Some of the benefits of Weatherization including energy savings, energy cost savings, improved home comfort, and increased safety.

Procedure for soliciting occupants' health and safety concerns related to components of their homes

Georgia requires all agencies to review with and have client sign a Radon Informed Consent form, Notice of Hazardous Materials Warning form, Weatherization Mold Inspection and Disclaimer Form, and LEAD Pre-Renovation form. Additionally, GEFA has updated the client application form to include a section to solicit the occupants' health conditions, which may be exacerbated by weatherization work.

Procedure for determining whether occupants suffer from health conditions which may be negatively impacted by the act of weatherizing their dwelling

As part of the initial application for weatherization, occupants shall be required to reveal any known or suspected health concerns. Occupants shall be screened again during the audit. During the audit process subgrantees should take all reasonable precautions by visually documenting (taking pictures of) the presence of mold, lead, asbestos or any toxic or potentially toxic conditions. Workers shall provide client information regarding any known risks. The client should be informed throughout this entire process of any issues or concerns discovered during the initial audit along with an explanation that weatherization would be inappropriate, or that the weatherization work scope must be modified or changed. The subgrantee must document its concerns in writing along with pictures and other relevant information and secure them in the client file.

Traditional weatherization approaches may need to be modified, delayed or eliminated to ensure that unintended consequences are prevented. Workers shall provide client with worker contact information so client can inform the workers of any issues.

Procedure for addressing potential health concerns including pre-existing health conditions when they are identified

- Identify and document existing and potential Health and Safety hazards that could be affected by weatherization activities.
- For each identified existing and potential hazard, determine whether it is an allowed WAP activity and within the resource limitations of the program.
- Identify whether the hazard should be mitigated before, during or after weatherization activities.
- Identify who is responsible for addressing each Health and Safety hazard (i.e., Subgrantee, the dwelling owner or client).
- Determine whether to go forward with weatherization, defer weatherization until the hazard is mitigated, or to walk away entirely.
- Provide written notification of the Health and Safety hazards to the owner/landlord in rental dwellings and to the client in both rental and owner-occupied dwellings. Include all information relevant to the hazard.
  - Document the results of all hazard mitigation activities.

Documentation Form(s) have been included for review?

Yes ☑ No ☐

Location where forms have been uploaded/submitted

Separate attachment to SF424 ☑ Separate attachment to H&S Plan ☐

6.0 – HEALTH AND SAFETY CATEGORIES

For each of the following H&S categories identified by DOE:

- *Explain whether you concur with existing guidance from Weatherization Program Notice (WPN) 17-7 and how that guidance will be implemented in your Program, if you are proposing an alternative action/allowability, or if the identified category will not be addressed and will always result in deferral. Alternatives require comprehensive explanations as to how it meets the intent of DOE guidance.*
- *Where an action/allowability or testing is "required" or "not allowed" through WPN 17-7, Grantees must concur, or choose to defer all units where the specific category is encountered.*
- *Any activities that are marked as deferral/referrals must contain the H&S reasons specified within the Master File Section V.1.2 Box 5 Deferral/Referral.*
- *Unless an alternate funding source(s) is declared, utilize DOE funds to address the particular category.*
- *Describe the explicit methods to address the specific category.*
- *Describe in detail what testing protocols (if any) used to assess the particular category.*
- *Define and quantify minimum thresholds that determine minor, major, and limited definitions and the criteria used to make a determination on a case-by-case basis.*
- *Define "at-risk" occupant(s) and identify minimum documentation requirements for them.*
- *Client Education activities specific to H&S reasons is required within the Master File Section V.8.4 Training and Technical Assistance of the annual application.*
- *Training activities specific to H&S reasons is required within the Master File Section V.8.4 Training and Technical Assistance of the annual application.*

6.1 – Air Conditioning and Heating Systems

Concurrence, Alternative or Deferral

Concurrence with DOE Guidance ☑ Alternative Guidance ☐ Results in Deferral/Referral ☐

Air Conditioning Unallowable with DOE Funds ☐ Heating Unallowable with DOE Funds ☐

Other Funding Source Addresses H&S Issue ☐ Enter Funding Source

Procedure for unsafe or non-functioning primary heating/cooling systems

Primary "red tagged", inoperable, or nonexistent heating system replacement, repair, or installation is allowed where climate conditions warrant, unless prevented by other guidance herein.
Primary cooling system replacement, repair, or installation is allowed only in homes of at-risk occupants where climate conditions warrant.
Primary systems are most relied upon to provide heating/cooling throughout the home. Secondary systems are employed only in extreme conditions.

- Unsafe secondary units, including space heaters, must be repaired, or removed and disposed of, or deferral is required. Secondary unvented space heaters are considered unsafe if they:
  - are not listed and labeled as meeting ANSI Z21.11.2;
  - have an input rating of more than 40,000 BTU/hour;
  - are in a bedroom and have an input rating of more than 10,000 BTU/hour;
  - are in a bathroom and have an input rating of more than 6,000 BTU/hour;
  - are operating in an unsafe manner (e.g., high carbon monoxide (CO) readings, too close to combustible materials, lack sufficient combustion air volume);
  - or are not permitted by the Authority Having Jurisdiction (AHJ).

An attempt to cost-justify the measure must be made via the DOE approved audit tool prior to replacing/repairing with health and safety funds.

Procedure for unsafe or non-functioning secondary heating systems, including unvented secondary space heaters

If unvented combustion space heaters are present in a home, they must be removed, except as secondary heat where the unit conforms to ANSI Z21.11.2.

Definition of and documentation required for "at-risk" occupants

An at-risk occupant is defined as a person/household meeting one or more of the following conditions: an elderly person (65 years or older); a person with health condition(s) that would be exacerbated by exposure to extreme temperature conditions; a person who is pregnant; a household containing an infant(s) (2 years or less).

Testing protocols

Testing for air-free CO levels must be performed and documented. Units left in home must be checked for labels which ensure conformity to ANSI Z21.11.2. Visually inspect the entirety of solid fuel-fired appliance installations (e.g., wood stoves, coal stoves, pellet stoves, fireplaces) including the venting system to ensure it adheres to the applicable code or local authority having jurisdiction. Appliances must be inspected pre and post-weatherization and any safety issues found should be included in the client H&S notification form.

Required Client Education

Concur with DOE Guidance ☑	Alternative Guidance ☐

- Appropriate use and maintenance of units.
- Provide all paperwork and manuals for any equipment installed by weatherization.
- Discuss and provide information on proper disposal of bulk fuel tanks when not removed as part of the weatherization work.
- Where combustion equipment is present, provide combustion safety and hazards information including how to recognize depressurization, dangers of CO poisoning, and fire risks associated with combustion appliance use.

6.2 – Asbestos (Confirmed and/or Presumed Asbestos Containing Material)

Concurrence, Alternative or Deferral

Concurrence with DOE Guidance ☑	Alternative Guidance ☐	Results in Deferral/Referral ☐

Unallowable Measure with DOE Funding ☐ Other Funding Source Addresses H&S Issue ☐ Enter Funding Source

Asbestos on Heating, Ventilation and Air Conditioning (HVAC) systems, distribution, venting and other small surfaces that will be disturbed through the course of weatherization work policy

Assume asbestos is present in covering materials. Encapsulation is allowed by an AHERA asbestos control professional and should be conducted prior to blower door testing. Removal may be allowed by an AHERA asbestos control professional based on the situation as determined by the inspector or subgrantee representative.

Asbestos in attics, walls, floors roofs and foundations that will be disturbed through the course of weatherization work policy

All precautions must be taken not to damage asbestos-containing surfaces. Asbestos siding and any asbestos containing surfaces such as walls, floors, roofs and foundation should never be cut or drilled.

Vermiculite that will be disturbed through the course of weatherization work policy

When vermiculite is present, unless testing determines otherwise, take precautionary measures as if it contains asbestos, such as not using blower door tests and utilizing personal air monitoring while in attics. Where blower door tests are performed, it is a best practice to perform pressurization instead of depressurization. Encapsulation by an appropriately trained asbestos control professional is allowed. Removal is not allowed.

Blower door testing policy when asbestos/vermiculite is present

When friable asbestos containing materials are found or suspected present, no blower door testing should be performed

Testing protocols

If a home contains asbestos containing materials but does not contain friable asbestos or vermiculite, then the recommended best practice is to use the blower door to pressurize instead of depressurizing the home.

Documentation requirements

If asbestos containing materials or suspected documentation will be provided to the client regarding potential health and safety concerns, location of those surfaces where asbestos has been identified, and how precautions will be taken. All documentation shall be signed by the client and maintained in the client file.

Required Client Education

Concur with DOE Guidance ☑	Alternative Guidance ☐

- Formally notify the occupant, and landlord if applicable, in writing:
  - of suspected ACMs that are present and what precautions will be taken to ensure the occupants' and workers' safety during weatherization;
  - of results if testing was performed;
  - not to disturb suspected ACM;
  - When deferral is necessary due to asbestos, occupant, or landlord if applicable, must provide documentation that a certified professional performed the remediation before work continues.

6.3 – Biologicals and Unsanitary Conditions

(e.g., odors, mustiness, bacteria, viruses, raw sewage, rotting wood)

Concurrence, Alternative or Deferral/Referral

Concurrence with DOE Guidance ☑ Alternative Guidance ☐ Results in Deferral/Referral ☐

Unallowable Measure with DOE Funding ☐ Other Funding Source Addresses H&S Issue ☐ Enter Funding Source

Biological and unsanitary conditions in dwellings policy

Limited Remediation (with a cost of less than $1000) of conditions that may lead to or promote biological concerns and unsanitary conditions is allowed. Addressing bacteria and viruses is not an allowable cost. Deferral may be necessary in cases where a known agent is present in the home that may create a serious risk to occupants or weatherization workers.

Testing protocols

Sensory inspection of interior, exterior, attics, and subspaces of the dwelling. Training will be provided using T&TA monies to teach auditors and workers how to recognize biological and unsanitary conditions and when to defer. Training will also focus on worker safety when coming in contact with these conditions. The use of DOE WAP H&S funds for testing of materials for biological contaminants is prohibited.

Required Client Education

Concur with DOE Guidance ☑	Alternative Guidance ☐

Inform occupant in writing of observed biological and unsanitary conditions.

6.4 – Building Structure and Roofing (e.g., roofing, wall, foundation)

Concurrence, Alternative or Deferral/Referral

Concurrence with DOE Guidance ☑ Alternative Guidance ☐ Results in Deferral/Referral ☐

Unallowable Measure with DOE Funding ☐ Other Funding Source Addresses H&S Issue ☐ Enter Funding Source

Structural issues in dwellings policy

Building rehabilitation is beyond the scope of the Weatherization Assistance Program.

Define and quantify minor or allowable structure and roofing issues. At what point are these considered beyond the scope of weatherization?

Homes with conditions that require more than incidental repair (Repairs necessary for the effective performance or preservation of weatherization materials) should be deferred. See Mold and Moisture, Code Compliance and Pests guidance below.

If priority lists are used and these repairs are designated as IRMs, at what point is a site-specific electronic energy audit required?

N/A

Required Client Education

Concur with DOE Guidance ☑	Alternative Guidance ☐

Notify occupant in writing of structurally compromised areas.

6.5 – Code Compliance

Concurrence, Alternative or Deferral/Referral

Concurrence with DOE Guidance ☑ Alternative Guidance ☐ Results in Deferral/Referral ☐

Unallowable Measure with DOE Funding ☐ Other Funding Source Addresses H&S Issue ☐ Enter Funding Source

Code compliance issues in dwellings policy

Correction of preexisting code compliance issues is not an allowable cost other than where weatherization measure(s) that triggered the code compliance issue must be documented in the occupant file. State and local (or jurisdiction having authority) codes must be followed while installing weatherization measures. Condemned properties and properties where "red tagged" health and safety conditions exist that cannot be corrected under this guidance should be deferred.

Required Client Education

Concur with DOE Guidance ☑	Alternative Guidance ☐

Inform occupant in writing of observed code compliance issues when it results in a deferral.

6.6 – Combustion Gases

Concurrence, Alternative or Deferral/Referral

Concurrence with DOE Guidance ☑ Alternative Guidance ☐ Results in Deferral/Referral ☐

Unallowable Measure with DOE Funding ☐ Other Funding Source Addresses H&S Issue ☐ Enter Funding Source

Combustion gas issues discovered during testing, including those that require an immediate response policy

Proper venting to the outside for combustion appliances, including gas dryers, refrigerators, furnaces, vented space heaters and water heaters is required. Correction of venting is allowed when testing indicates a problem. If unsafe conditions whose remediation is necessary to perform weatherization cannot be remedied by repair or tuning, replacement is an allowable health and safety measure.

Testing protocols

- Combustion safety testing is required on all combustion appliances located in or adjacent to the living space – this includes heating systems, water heaters, dryers, ovens, cooktops. Venting of combustion appliances will be inspected to confirm proper functionality, code compliance, and confirm adequate clearances. All Category 1 appliances will be tested for spillage under worst case conditions before and after air tightening and at the end of every day while weatherization work is underway. Cooking burners will be tested for operability and flame quality. Ovens will be tested to confirm CO levels are within acceptable limits.
- If combustion appliances are found to be failing spillage, appropriate action must be taken to alleviate the issue. Potential solutions include but are not limited to: eliminating pressure imbalances causing the excessive depressurization of the CAZ, isolating the appliance from the living space, repairing or replacing the flue/chimney, replacing the system (with the exceptions of ovens and ranges which may not be replaced with DOE funds).
- Combustion appliances experiencing CO levels higher than acceptable limits require a Clean-and-Tune by licensed HVAC professional, followed by additional CAZ testing to verify CO has been brought within acceptable limits.
- Kitchen vent hoods should be installed in homes and properly vented to outside where a gas cooktop exists, and no exhaust ventilation is present.
- DOE WAP Grantees must comply with the Manufactured Home Construction and Safety Standards which mandates that:
- All fuel-burning appliances in manufactured homes except ranges, ovens, illuminating appliances, clothes dryers, solid fuel-burning fireplaces and solid fuel burning stoves, must be installed to provide for the complete separation of the combustion system from the interior atmosphere of the manufactured home (i.e., to draw their combustion air from outside), and be vented to outside the dwelling. o All appliances installed by weatherization in manufactured homes must meet these standards, including secondary heating sources. No unvented fuel-burning space heating appliances may remain in a MH after weatherization under any circumstances. If an occupant will not allow the removal of an unsafe combustion appliance from the home, deferral is required. o Repair or replace combustion gas venting to ensure proper combustion gas venting to outside the dwelling for all combustion appliances, including but not limited to gas dryers and refrigerators, furnaces, vented space heaters, and water heaters.
- A Carbon Monoxide detector must be installed per current ASHRAE 62.2-2016 standards.

6.7 – Electrical
Concurrence, Alternative or Deferral/Referral
Concurrence with DOE Guidance ☑ Alternative Guidance ☐ Results in Deferral/Referral ☐
Unallowable Measure with DOE Funding ☐ Other Funding Source Addresses H&S Issue ☐ Enter Funding Source
Electrical hazards, including knob & tube wiring, in dwellings policy
Minor electrical repairs are allowed where health or safety of the occupant is at risk. Upgrades and repairs are allowed when necessary to perform specific weatherization measures. Evaluate and if necessary, provide sufficient over-current protection and damming (if required) prior to insulating building components containing knob and tube wiring, as required by AHJ.
Define and quantify minor electrical issues. At what point are these considered beyond the scope of weatherization?
Minor electrical repairs or upgrades of energy related health and safety are allowable up to $1,000 dollars. When necessary for the installation of an ECM(s) DOE funds may also be used to cover the cost of electrical inspections by a licensed electrician in order to verify proper electrical wiring and electrical wiring loads. Major electrical repairs or upgrades in excess of $1,000 dollars are beyond the scope of DOE WAP and may be cause for deferral. Agencies should always seek to be aware of additional funds or services for electrical upgrades and/or repairs providing information on all such options to the client.
If priority lists are used and these repairs are designated as IRMs, at what point is a site-specific electronic energy audit required?
N/A

Required Client Education	
Concur with DOE Guidance ☑	Alternative Guidance ☐
Concur with DOE Guidance ☑	
• Provide occupant with written documentation of any electrical hazards identified that will not be addressed by weatherization • Provide information to occupant on over-current protection, overloading circuits, and basic electrical safety/risks if conditic warrant.	

6.8 – Formaldehyde, Volatile Organic Compounds (VOCs), Flammable Liquids, and other Air Pollutants

Concurrence, Alternative or Deferral/Referral		
Concurrence with DOE Guidance ☑	Alternative Guidance ☐	Results in Deferral/Referral ☐
Unallowable Measure with DOE Funding ☐	Other Funding Source Addresses H&S Issue ☐	Enter Funding Source

Formaldehyde, VOCs, flammable liquids and other air pollutants in dwellings policy

Removal of pollutants is allowed and is required if they pose a risk to workers. If pollutants pose a risk to workers and removal cannot be performed or is not allowed by the client, the unit must be deferred. Refer to *Hazardous Materials Disposal* section for more information.

Testing protocols

Sensory inspection will be performed to identify presence of pollutants in the home. If identified, pollutants should be removed from the home prior to beginning weatherization work, so long as by doing so no risk is presented to workers or occupants.

6.9 – Fuel Leaks *(please indicate specific fuel type if policy differs by type)*

Concurrence, Alternative or Deferral/Referral		
Concurrence with DOE Guidance ☑	Alternative Guidance ☐	Results in Deferral/Referral ☐
Unallowable Measure ☐		

Fuel leak remediation protocols

When a gas leak is found on the utility side of service, the utility service must be contacted before work may proceed. Notify the utility and halt work if a leak is discovered during weatherization. Fuel leaks that are major (exceeding the health and safety limit) are the responsibility of the client (vs. the utility) and must be repaired before weatherizing a unit.

At what point are fuel leaks considered beyond the scope of weatherization?

Fuel leaks that are major (exceeding the health and safety limit) are the responsibility of the client (vs. the utility) and must be repaired before weatherizing a unit. Some fuel leaks can be repaired with weatherization readiness funds.

Testing protocols

Test all accessible gas lines to include internal gas components inside combustion appliances. Test exposed gas lines for fuel leaks from utility coupling into and throughout, the home. Conduct sensory inspection on bulk fuels to determine if leak exists. "Usage of gas leak detectors will be done to conduct tests according to current BPI standards"

Required Client Education	
Concur with DOE Guidance ☑	Alternative Guidance ☐
Inform occupants in writing of fuel leak testing results, including specific location if fuel leaks are detected.	

6.10 – Gas Range/Ovens /Stovetops

Concurrence, Alternative or Deferral/Referral

Concurrence with DOE Guidance ☑ Alternative Guidance ☐ Results in Deferral/Referral ☐

Unallowable Measure with DOE Funding ☐ Other Funding Source Addresses H&S Issue ☐ Enter Funding Source

Unsafe gas range/ovens policy

When testing indicates a problem, entities may perform standard maintenance on or repair gas cooktops and ovens. Replacement of ovens and ranges is not allowed.

Testing protocols

Test gas ovens for CO. Inspect cooking burners and ovens for operability and flame quality.

(Testing will be done per BPI Standard 1200)

Identify the listing nameplate on the appliance and record the model name and model number, if available. Determine through homeowner/occupant interview if the appliance is the primary heating source. If the appliance is the primary heating source, determine when the chimney and vent connector were last cleaned and inspected. If they have not been cleaned and inspected within the past year, recommend servicing by a certified hearth professional. Visually inspect and note the type and condition of flooring material where the appliance is installed. *A recommendation for service by a qualified professional or a recommendation for replacement of the appliance shall be made if any of the following 3 indicators are noted:

- Appliances installed on carpets, wood floors or other combustibles.
- Inadequate clearance to combustible materials. Consult the appliance documentation for required clearances.
- Signs of structural failure, such as cracks or broken welds, of any components.

Replacement of gas ovens/stovetops/ranges is not allowed with DOE funds but may be purchased with other funding sources.

Required Client Education

Concur with DOE Guidance ☑	Alternative Guidance ☐

Inform occupants of the importance of using exhaust ventilation when cooking and the importance of keeping burners and broilers clean to limit the production of CO.

6.11 – Hazardous Materials Disposal [e.g., Lead, Refrigerant, Asbestos, Mercury (including CFLs/fluorescents), etc.] *(please indicate where policy differs by material)*

Concurrence, Alternative or Deferral/Referral

Concurrence with DOE Guidance ☑ Alternative Guidance ☐ Results in Deferral/Referral ☐

Unallowable Measure with DOE Funding ☐ Other Funding Source Addresses H&S Issue ☐ Enter Funding Source

Hazardous materials disposal policy (existing material/appliance and hazardous material)

Hazardous Waste Materials generated in the course of weatherization work shall be disposed of according to all local laws, regulations and/or Federal guidelines, as applicable. Limited removal of pollutants (flammable liquids, hazardous chemicals, and other air pollutants) that pose a risk to the occupant is allowable. Document proper disposal requirements in the contract or work order language with responsible party. Reclaim refrigerant per Clean Air Act 1990, section 608, as amended by 40 CFR82, 5/14/93. Refer to *Lead* and *Asbestos* sections for more information on these topics.

Documentation requirements

In order to perform testing, recharge, and/or reclaim refrigerant, workers must hold EPA-approved section 608 type I or universal certification.

Required Client Education

Concur with DOE Guidance ☑	Alternative Guidance ☐

- Inform occupant in writing of hazards associated with hazardous waste materials being generated/handled in the home.
- Inform occupant in writing of observed hazardous condition and associated risks.
- Provide occupant written materials on safety issues and proper disposal of household pollutants.

6.12 – Injury Prevention of Occupants and Weatherization Workers
(e.g., repairing stairs and replacing handrails)

Concurrence, Alternative or Deferral/Referral

Concurrence with DOE Guidance ☐ Alternative Guidance ☑ Results in Deferral/Referral ☐

Unallowable Measure with DOE Funding ☐ Other Funding Source Addresses H&S Issue ☐ Enter Funding Source

Injury prevention measure(s) policy

Workers must take all reasonable precautions against performing work on homes that will subject workers or occupants to health and safety risks. When necessary to effectively weatherize a home, workers may make minor repairs and installations. Please refer to *Incidental Repair Measures* section for more details.

Define and quantify minor or allowable injury prevention measures. At what point are these considered beyond the scope of weatherization?

Inspection will be performed to identify whether dangers are present in the home that would prevent weatherization work to proceed or would subject workers or occupants to health and safety risks. If these dangers are minor (below the health and safety limits above) they may be corrected, as long as correction is necessary to allow weatherization work to proceed. If these dangers are major (Major repairs include repairs that have costs above the Health & Safety budget limit per housing unit. Repair costs that exceed the H & S budgets are beyond the scope of weatherization.) Or if it is not necessary to repair the dangerous condition to allow weatherization work to proceed, the home should be deferred. The client should be given information on the dangers observed and provided with recommendations and referral information if available.

Required Client Education

Concur with DOE Guidance ☑	Alternative Guidance ☐

If identified hazardous conditions will not be corrected during weatherization, inform occupant in writing of observed hazards and associated risks utilizing the "Hazard Identification Notification Form" required by WPN 22-7.

6.13 – Lead Based Paint

Concurrence, Alternative or Deferral/Referral

Concurrence with DOE Guidance ☑ Alternative Guidance ☐ Results in Deferral/Referral ☐

Unallowable Measure with DOE Funding ☐ Other Funding Source Addresses H&S Issue ☐ Enter Funding Source

Lead safe work protocols

Follow EPA's Lead; Renovation, Repair and Painting Program (RRP) when weatherization crews are working in pre-1978 housing. Deferral is required when the extent and condition of lead-based paint in the house would potentially create further health and safety hazards. Only those costs directly associated with the testing and lead safe practices for surfaces directly disturbed during weatherization activities are allowable.

Testing protocols

Job site testing setup and cleaning verification is required by a Certified Renovator. A copy of the Certified Renovator's report will be in the client file.

Documentation requirements

Documentation in the client file must include Certified Renovator certifications and a description of specific actions taken, testing, photos and site containment set up.

Required Client Education

Concur with DOE Guidance ☐	Alternative Guidance ☑

Follow pre-renovation education requirements

6.14 – Mold and Moisture
(e.g., drainage, gutters, down spouts, extensions, flashing, sump pumps, dehumidifiers, landscape, vapor retarders, moisture barriers)

Concurrence, Alternative or Deferral/Referral

Concurrence with DOE Guidance ☑ Alternative Guidance ☐ Results in Deferral/Referral ☐

Unallowable Measure ☐ Other Funding Source Addresses H&S Issue ☐ Enter Funding Source

Moisture related issues in dwellings policy

Limited water damage repairs that can be addressed by weatherization workers and correction of moisture and mold creating conditions are allowed when necessary in order to weatherize the home and to ensure the long-term stability and durability of the measures. Source control is allowed when necessary to weatherize the home and to ensure the long-term stability and durability of the measures. Where severe mold and moisture issues cannot be addressed, deferral is required.

Define and quantify minor or allowable moisture-related measures. At what point are these considered beyond the scope of weatherization?

DOE WAP funding may be used to perform water damage repairs and correction of moisture and mold creating conditions when necessary in order to weatherize the home and to ensure the long-term stability and durability of the measures. DOE WAP funds may not be used for mold testing. Where severe mold and moisture issues cannot be addressed, deferral is required if weatherization readiness funds cannot address the conditions.

Required Client Education

Concur with DOE Guidance ☑	Alternative Guidance ☐

Provide occupant written notification of identified mold/moisture hazards and information regarding the associated hazard.

6.15 – Pests

Concurrence, Alternative or Deferral/Referral

Concurrence with DOE Guidance ☑ Alternative Guidance ☐ Results in Deferral/Referral ☐

Unallowable Measure with DOE Funding ☐ Other Funding Source Addresses H&S Issue ☐ Enter Funding Source

Pests and pest intrusion prevention policy

Pest removal is allowed only where infestation would prevent weatherization. Infestation of pests may be cause for deferral where it cannot be reasonably removed or poses health and safety concern for workers. Screening of windows and points of access is allowed to prevent intrusion.

Define and quantify pest infestation thresholds. At what point are these considered Beyond the scope of weatherization

DOE WAP funding may be used for pest removal only where infestation would prevent weatherization and for screening of windows and points of access to prevent intrusion.

If infestation of pests poses a health and safety concern for workers or pests cannot be reasonably removed, agencies can use weatherization readiness funds to prevent the home from being deferred. Agencies should always seek to be aware of additional funds or services for pests and should provide information on all applicable options to the client.

Required Client Education

Concur with DOE Guidance ☑	Alternative Guidance ☐

Inform occupant in writing of observed conditions and associated risks.

6.16 – Radon

Concurrence, Alternative or Deferral/Referral

Concurrence with DOE Guidance ☑ Alternative Guidance ☐ Results in Deferral/Referral ☐

Unallowable Measure with DOE Funding ☐ Other Funding Source Addresses H&S Issue ☐ Enter Funding Source

Procedure for radon in dwellings
Whenever site conditions permit, exposed dirt floors should be covered within the pressure/thermal boundary with a sealed soil gas retarder, a 6 mil or greater polyethylene sheeting, lapped at least 12 inches and sealed with appropriate sealant at all seams, walls and penetrations. Other precautions include sealing any observed floor or foundations penetrations, covering open sump well/pits with airtight covers, and implementing ventilation as required by current ASHRAE 62.2- 2016 Standards.
Testing protocols
Radon testing is not allowed with DOE H&S funds
Documentation requirements
All clients must sign the radon consent form. If client testing reveals high levels (4.o pc/ml or higher) in a home, subgrantees should provide documentation and information to client regarding the dangers associated with radon and any available references or funding sources to address the issue. If home is suspected or tested to confirm higher than acceptable radon levels, all clients must provided with *EPA A Citizen's Guide to Radon* found here: https://www.epa.gov/sites/default/files/2016-12/documents/2016_a_citizens_guide_to_radon.pdf. All documentation shall be signed by the client and maintained in the client file.

Required Client Education	
Concur with DOE Guidance ☑	Alternative Guidance ☐
• Provide all occupants EPA's A Citizen's Guide to Radon and inform them of radon related risks. • Occupants must sign an informed consent form prior to receiving weatherization services.	

6.17 – Safety Devices: Smoke and Carbon Monoxide Alarms, Fire Extinguishers

Concurrence, Alternative or Deferral/Referral		
Concurrence with DOE Guidance ☑	Alternative Guidance ☐	Results in Deferral/Referral ☐
Unallowable Measure with DOE Funding ☐	Other Funding Source Addresses H&S Issue ☐	Enter Funding Source
Installation or replacement policy for the following safety devices:		
Smoke Alarms: Installation of smoke alarms is allowed where detectors are not present or are inoperable.		
Carbon Monoxide Alarms: CO alarms are required to comply with current ASHRAE Standards 62.2-2016.		
Fire Extinguishers: Providing fire extinguishers is allowed only when solid fuel (such as wood) is present.		
Testing protocols		
Homes should be inspected to determine if smoke/CO alarms are present and/or operable. If not operable or present, smoke alarms may be installed per local and state codes. If not operable or present, CO alarms must be installed per local and state codes. A fire extinguisher may be provided in homes where primary heat source is wood. The fire extinguisher must be installed according to manufacturer standards and local code in vicinity of the primary heating source.		

Required Client Education	
Concur with DOE Guidance ☑	Alternative Guidance ☐
Provide occupant with verbal and written information on use of newly installed devices and the potential risks of not properly maintaining these devices.	

6.18 – Ventilation and Indoor Air Quality

Concurrence, Alternative or Deferral/Referral		
Concurrence with DOE Guidance ☑	Alternative Guidance ☐	Results in Deferral/Referral ☐
Version of American Society of Heating Refrigeration and Air-conditioning Engineers (ASHRAE) 62.2 Implemented (optional: identify Addenda used)		
Current ASHRAE standards is required to be met to the fullest extent possible when performing weatherization activities. Implementing current ASHRAE 62.2 standards is not required where acceptable indoor air quality already exists as defined by current ASHRAE standards 62.2-2016.		
Procedures for complying with implemented ASHRAE standard		
Existing fans and blower systems should be updated if not adequate according to : Current ASHRAE 62.2.-2016 requirements.		

Testing protocols
The following actions are required and must be performed in all homes in regards to ventilation: Current ASHRAE standards evaluation and calculations before and after weatherization work is performed (including Blower Door testing), pre-weatherization fan flow testing of existing systems, and post-installation fan flow testing of new installations in order to ensure compliance with current ASHRAE 62.2.-2016 standards All work must adhere to all federal, state, and local worker safety regulations (e.g., OSHA, EPA).and Safety Data Sheets (SDS) *Minor* repairs and installations such as repairing stairs, replacing handrails, installing door handles.

Required Client Education	
Concur with DOE Guidance ☑	Alternative Guidance ☐

- Provide occupant with information on function, use, and maintenance (including location of service switch and cleaning instructions) of ventilation system and components.
- Provide occupant with equipment manuals for installed equipment.
- Include disclaimer that ASHRAE 62.2 does not account for high polluting sources or guarantee indoor air quality.

6.19 – Window Repair, Door Repair

Concurrence, Alternative or Deferral/Referral		
Concurrence with DOE Guidance ☑	Alternative Guidance ☐	Results in Deferral/Referral ☐
Unallowable Measure with DOE Funding ☐	Other Funding Source Addresses H&S Issue ☐	Enter Funding Source

Window repair and door repair H&S policy
Replacement, repair, and/or installation is not an allowable health & safety cost using DOE funds but maybe allowed as an incidental repair or an ECM if SIR ≥ 1 or using non DOE funds. If replacement, repair, and/or installation of windows, doors, or window guards is necessary, it must be determined whether it meets the criteria for incidental repairs. If so, it may be treated as such and addressed. If not, a NEAT or MHEA audit should be performed to determine whether the work meets an SIR ≥ 1. If so, it may be addressed as an ECM. Otherwise, the home should be deferred.

6.20 – Worker Safety (e.g., OSHA)

Concurrence, Alternative or Deferral/Referral		
Concurrence with DOE Guidance ☑	Alternative Guidance ☐	Results in Deferral/Referral ☐
Unallowable Measure with DOE Funding ☐	Other Funding Source Addresses H&S Issue ☐	Enter Funding Source

Federal, state and local worker safety requirements policy
Workers must follow OSHA standards and Safety Data Sheets (SDS) and take precautions to ensure the health and safety of themselves and other workers. SDS must be posted wherever workers may be exposed to hazardous materials.

Training and Certification Requirements
All on-site assessors/inspectors must complete OSHA safety training. All subgrantees and contractors must maintain compliance with the current OSHA Hazard Communication Standard, including on-site organized Safety Data Sheets (formerly called MSDS). DOE funds will be used for OSHA training. Equipment purchases to protect the health and safety of the worker (e.g., Personal Protective Equipment (PPE), jobsite cleaning supplies)

6.21- Water Heaters

Concurrence, Alternative, or Deferral

Concurrence with Guidance ☑ Alternative Guidance ☐ Results in Deferral ☐

Unallowable Measure with DOE Funding ☐ Other Funding Source Addresses H&S Issue ☐ Enter Funding Source

Allowable Action

• Limited case-by-case replacement of water heaters if the water heater poses a life-safety risk to occupants (e.g., leaking primary tank, high CO measurements). Replacement request will be evaluated to confirm health and safety risks such as leaking primary tank, high CO levels. If the total cost of repair(s) is higher than the cost to replace the unit can be replaced with DOE H&S funds

• Minor safety repairs of water heaters (e.g., T&P valve piping, backflow prevention devices, expansion tanks) as defined by the Grantee's H&S plan. Minor repairs include the renewal or replacement of any existing part or parts of a unit, not to exceed the cost of replacement.
• Replace, repair, or install primary water heater heaters when existing primary water heater is unsafe, inoperable, or nonexistent

Testing Protocol

• Visual inspection of all water heaters and related piping for safety and leaks
• See Combustion Appliances section for related combustion safety testing requirements.

Required Client Education

Concur with DOE Guidance ☑	Alternative Guidance ☐

- Appropriate use and maintenance of units.
- Provide all paperwork and manuals for any installed equipment.
- Where combustion equipment is present, provide combustion safety and hazards information including how to recognize depressurization, dangers of CO poisoning, and fire risks associated with combustion appliance use.

TRAINING AND TECHNICAL ASSISTANCE (T&TA) PLAN TEMPLATE

1.0 – GENERAL INFORMATION

COMMENTS THAT DO NOT GENERALLY FIT INTO THE AVAILABLE TABLES BELOW

ENTER ADDITIONAL H&S INFORMATION HERE

2.0 – OVERALL T&TA PLAN

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

FEEDBACK FROM INTERNAL AND EXTERNAL REVIEWS, EXAMPLES INCLUDE:

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

GEFA PLANS TRAININGS BASED ON STATE MONITORING OF SUBGRANTEES AND DOE MONITORING AND CORRESPONDENCE.

.

EXISTING OR PLANNED ACCREDITED TRAINING CENTER PARTNERSHIP OR WORKING RELATIONSHIP.

GEFA IS CURRENTLY CONTRACTED WITH EVERBLUE FOR ANNUAL TRAININGS, TECHNICAL ASSISTANCE AND MONITORING. GEFA AND SUBGRANTEES HAVE ATTENDED OR PLAN TO ATTEND TRAININGS FROM SOUTHFACE, EVER BLUE, SANTA FE COMMUNITY COLLEGE, GREEN TRAINING OR OTHER IREC AFFILIATED TRAINING CENTERS AS ASSESSABLE.

PREPARATIONS FOR FUTURE/UPCOMING PROGRAM REQUIREMENTS, EXAMPLES INCLUDE:

- **UPDATED STANDARD WORK SPECIFICATIONS (SWS)**
- **MIGRATION TO ONLINE WEATHERIZATION ASSISTANT**
- **INCLUSION OF SPECIFIC LANGUAGE FROM WEATHERIZATION PROGRAM NOTICES (WPN)**

THE CURRENT GEFA SWS FIELD GUIDE WAS APPROVED BY DOE IN JUNE 2021.

WHAT PROTOCOLS ARE IN PLACE WHICH ENSURE UNTRAINED STAFF ARE NOT LEFT WITHOUT SUPERVISIONS DURING FIELD OPERATIONS?

GEFA PROVIDES TRAINING ANNUALLY TO THE GEORGIA WEATHERIZATION NETWORK. ADDITIONALLY, THE GEORGIA STATE PLAN REQUIRES THAT ALL INSTALLERS BEGIN TRAINING WITHIN FIRST 6 MONTHS OF HIRE. GEFA REQUIRES SUCCESSFUL COMPLETION OF ITS CERTIFICATION TRAINING FOR ALL AUDITORS AND INSPECTORS. THE STATE ALLOCATES T&TA FUNDS TO EACH SUBRECIPIENT FOR THE MANDATED TRAININGS AS NEEDED. STAFF THAT DO NOT MEET THE REQUIREMENTS OF CERTIFICATION DO NOT HAVE SIGNATURE AUTHORITY ON ASSESSMENTS OR FINAL INSPECTIONS. PER OUR OPERATIONS MANUAL, ALL DOE FINAL UNITS MUST RECEIVE A FINAL INSPECTION BY A BPI-CERTIFIED QUALITY CONTROL INSPECTOR. INDIVIDUALS THAT DO NOT HOLD BPI-CERTIFIED QCI ARE PROHIBITED FROM CONDUCTING FINAL INSPECTIONS.

PARTNERSHIPS WITH THE STATEWIDE HOME PERFORMANCE INDUSTRY ON TRAINING ISSUES; IF APPLICABLE.

N/A

HOW DOES ANALYSIS CONDUCTED, AS DETAILED IN SECTION V.6 OF THE ANNUAL APPLICATION, INFLUENCE THE

DEVELOPMENT OF T&TA ACTIVITIES AND PRIORITIES?
MONITORING ALLOWS FOR COMPREHENSIVE REVIEW OF THE SUBGRANTEES AND WORK BEING PERFORMED. GEFA TRACKS MONITORING FINDINGS AND OBSERVATIONS IN IGEFA. THIS INFORMATION IS USED WHEN EVALUATING PREVIOUS TRAINING OUTCOMES AND IDENTIFICATION OF FUTURE TRAINING NEEDS AND SHARING OF BEST PRACTICES.

3.0 – WORKFORCE CREDENTIALS

DESCRIBE THE FOLLOWING ASPECTS OF YOUR T&TA PLAN RELATED TO WORKFORCE CREDENTIALS.

FEDERALLY REQUIRED CREDENTIALS. EXAMPLES INCLUDE:

- **ENVIRONMENTAL PROTECTION AGENCY LEAD RENOVATION, REPAIR, AND PAINTING PROGRAM**
- **HOME ENERGY PROFESSIONALS QUALITY CONTROL INSPECTOR CERTIFICATION**

GEFA ONLY REQUIRES CERTIFICATION FOR THE FOLLOWING CLASSIFICATIONS.
HOME ENERGY PROFESSIONAL ENERGY AUDITOR CERTIFICATION
HOME ENERGY PROFESSIONAL QUALITY CONTROL INSPECTOR CERTIFICATION

GRANTEE/STATE REQUIRED CREDENTIALS. EXAMPLES INCLUDE:

- **BUILDING PERFORMANCE INSTITUTE BUILDING ANALYST**
- **GRANTEE-DEVELOPED CERTIFICATIONS**

State monitors are required to be BPI QCI certified

SUBGRANTEE/LOCAL REQUIRED CREDENTIALS. EXAMPLES INCLUDE:

- **CONTRACTOR LICENSING**

ALL SUBGRANTEES AND CONTRACTORS ARE REQUIRED TO HAVE ALL STATE AND LOCAL LICENSES AS REQUIRED BY THE STATE OF GA

INDUSTRY REQUIRED CREDENTIALS. EXAMPLES INCLUDE:

- **EQUIPMENT/MATERIAL MANUFACTURE CERTIFICATION**
- **VENDOR CERTIFICATION**

(E.G. EQUIPMENT/MATERIAL MANUFACTURE CERTIFICATION, VENDOR CERTIFICATION)

DESCRIBE INDUSTRY REQUIRED CREDENTIALS HERE

PROCESS FOR MAINTAINING WORKFORCE CREDENTIALS

SUBGRANTEES ARE ENCOURAGED TO RE-CERTIFY THEIR WEATHERIZATION WORKERS AT LEAST SIX MONTHS PRIOR TO THE EXPIRATION OF THE INDIVIDUAL'S CERTIFICATION DATE FOR ENERGY AUDITOR AND QUALITY CONTROL INSPECTORS AS WELL AS ALL OTHER OCCUPATIONAL SPECIALTIES REQUIRING CERTIFICATION. ALL CREDENTIALS AND CERTIFICATIONS OBTAINED BY ENERGY AUDITORS AND QCIS ARE DOCUMENTED WITHIN IGEFA AND HANCOCK AND REQUIRED TO BE MAINTAINED IN GOOD STANDING TO BE ALLOWED TO PERFORM ASSIGNED WORK. SUBGRANTEES ARE RESPONSIBLE FOR ENSURING THEIR CONTRACTORS HOLD THE NECESSARY LICENSURE TO CONDUCT BUSINESS IN LOCAL GOVERNMENT REGIONS. SUBGRANTEES ARE REQUIRED TO HAVE AN INTERNAL PROCESS IN PLACE TO ENSURE ALL REQUIRED WORKFORCE CREDENTIALS ARE OBTAINED, TRACKED, AND MAINTAINED.

HOW CREDENTIALS ARE TRACKED

CREDENTIALS ARE TRACKED IN HANCOCK AND IGEFA

4.0 – Training

Grantees have two options to describe their training.

A) Use the embedded spreadsheet* to Identify and describe the training schedule for Grantee and Subgrantee staff. Include technical and non-technical training.
B) OR Use the fields below to identify and describe the training schedule for Grantee and Subgrantee staff. Include technical and non-technical training.

Grantee's are to include the following in their descriptions regardless of what option is being used to describe their training plan:

- Specify whether attendance is mandatory, and the ramifications for non-compliance.
- Specify If the T&TA plan spans multiple Program Years (PY), indicate which trainings are intended in the current PY and which are planned for future PYs.

* the embedded spreadsheet, if completed at the end of the year to record delivered training, can be used as Documentation for the required annual T&TA report. Double click to open spreadsheet. Enter information and close. It will automatically save your information

TTA Planning and
Reporting Template F

Programmatic/Administration Training

- Financial (i.e. 2 CFR 200)
- Management (i.e. 10 CFR 440)
-

The annual Georgia weatherization training conference include fiscal, Technical and programmatic training. GEFA has recognized experienced WX network subgrantees who assist with peer to Peer training. The GEFA Program MANGER WILL assist with trainings, reporting and monitoring of fiscal and administrative management during the Program Year.

There has been a surge in demand for home weatherization across many states, resulting in a significant workforce shortage. To address this challenge, a new program has been introduced in Georgia. This initiative offers a short-term training opportunity for Georgia residents, designed to quickly prepare them for employment in the weatherization sector. Georgia will introduce two new programs a Pre Apprenticeship Program and a work study program.

Weatherization Work Study Program (Pending DOE Approval)
In order to enhance Georgia's workforce, GEFA has enlisted the assistance of EverBlue to establish a weatherization work study program for the purposes of recruiting and retaining talent within Georgia's weatherization network. Everblue will manage the enrollment process and supplement reimbursement for this pilot project. Participants will enroll in each course provided in the following course schedule. Travel fees will be paid one week ahead of course training date.

Supplements will be provided to the student at the successful completion of each training program. Completion is defined as attending the entire training program
and earning a certificate of completion or industry certification.

The program's key features include:
1. Rapid training: Participants undergo a focused, short-term
training curriculum.
2. Employment Opportunity: Upon successful completion of the program, trainees are offered opportunities to pursue fulltime
employment within 90 days.
3. Local focus: The initiative specifically targets Georgia residents, aiming to build a skilled local workforce.
This program serves a dual purpose by addressing the critical workforce shortage in weatherization services while simultaneously creating job opportunities for Georgia
residents. It represents a strategic response to the increased demand for energy efficient
homes, aligning with the goals of the Bipartisan Infrastructure Law as well as
formula funded grants.

Proposed Training Materials and Methods

Everblue will act as the central coordinating agency, aligning our training efforts across all of Georgia's WAP regions. This comprehensive approach would ensure
consistent program delivery and empower new and existing WAP contractors through our diverse training portfolio, including apprenticeships, which is designed to
launch and elevate careers in the weatherization field.
Everblue teaches high-quality programs nationwide and provides online learning management systems. Our proposal combines those two capabilities to offer a hybrid
training methodology. This methodology will help recruit, train, upskill, and retain the weatherization workforce by making training higher quality, more accessible, and immediately impactful in the trainee's life.
EverCert Learning Management System. This online system is key to our methodology. It enrolls and tracks not just online training but the trainee's entire journey, including in person courses, post course
support, and training pathways (as laid out in the sample training and certification schedule). Learn more about EverCert and our LMS software.

Marketing & Recruitment Strategies

Everblue will utilize a comprehensive, multichannel recruitment strategy to attract qualified pre apprentices and secure the participation of Wx related
agencies across
the state.
Targeted Outreach and Matchmaking**:** We'll go beyond traditional methods like flyers and job fairs. We'll partner with career counselors, social service agencies,
and community based organizations to reach potential candidates in underserved communities, interview them before enrollment, and match them with potential employers/weatherization agencies as early as possible.
Digital Marketing**:** Targeted social media ads and informative online content will attract candidates interested in weatherization careers and, to galvanize employer/weatherization agency interest in participating in the program, we will also disseminate employer focused digital messaging explaining the unique
benefits of hiring apprentices.
Information Sessions and Workshops**:** Information sessions and workshops will provide pre-apprentices and employers/weatherization agencies with a clear understanding of program benefits and career paths, as well as the opportunity to ask questions and address any barriers to participation.
Workforce Development Hub**:** Everblue will create a user-friendly
online resource were recruitment and matchmaking between employers/weatherization

agencies and GA WAP apprentices can be easily facilitated and tracked.

Engaging Employers/ Wx Agencies:

Everblue will cohost job fair days and participate in industry events alongside Wx agencies, presenting the program's benefits to potential candidates and employers.

Screening Tools

Everblue will implement a comprehensive screening plan to identify the ideal candidates for this program. Deliverables include:

A written application that captures demographic information, as well as work history and educational background.

A workplace skills assessment that measures knowledge on basic workplace knowledge and minor construction skills.

An interview process that screens individuals for professionalism and commitment to the program.

A comprehensive applicant tracking system that tracks progress and maintains consistency across the program.

Description of the Proposed Training and Materials for Pre-Apprentices

Everblue's proposed pre-apprenticeship program, funded through Georgia's WAP program, offers a unique and comprehensive approach to workforce development. This program goes beyond traditional training by also encompassing wraparound services, career counseling, professional development skill building, and other resources that empower apprentices to succeed. Ultimately, Everblue's proposed program will help create a pipeline of highly skilled weatherization professionals in Georgia, with a particular focus on empowering residents from disadvantaged communities. At a high level, it will include:

In-depth technical training: This covers a broader range of skills compared to standard training, equipping them for a wider variety of weatherization tasks.

Multiple certifications: Completion of the program leads to industry recognized certifications, demonstrating expertise and increasing employability.

Professional development skill building: Everblue will offer pre apprenticeship workshops to enhance resume writing, interview skills, customer service skills, and job readiness. This will help ensure we develop a well-rounded group of professionals who can excel in various roles.

Wraparound services & supplemental wages: Recognizing potential barriers, we offer support services like childcare assistance and transportation to alleviate financial concerns and allow full participation.

Focus on entry-level & basic tasks: The program starts with a solid foundation in core weatherization tasks, ensuring a smooth transition into the workforce.

As apprentices gain experience, they progress to more complex tasks throughout the program.

Proposed Training Formats (i.e. in person, virtual, hybrid, etc.).

Everblue will offer a mix of in-person, virtual, and hybrid training. Many of the courses we offer feature a mix of all three learning formats simultaneously, which would make them even more accessible to apprentices. Some training will be offered online via our Learning Management System (LMS) so that new employees can immediately access the training without having to wait for the current yearly training offerings.

Everblue prioritizes student success, evidenced by our proven track record in delivering apprenticeship programs alongside various partners. Our dedicated student advisors are the key to our ability to foster a supportive and enriching learning environment for apprentices. These advisors forge long term, personal relationships with each apprentice, going above and beyond answering student questions. They support students in the following ways:

Provide Logistical Support: From transportation issues to training access, our advisors help overcome logistical hurdles to ensure smooth attendance.

Connect Apprentices with Financial Resources: Everblue's student advisors connect apprentices with childcare resources when needed, allowing parents to focus on training.

Problem Solving

Support: Whether it is online training login issues or internet connectivity, our advisors are available to troubleshoot and resolve any problem.

Flexible Learning Options: Recognizing the importance of adaptability, we adjust training schedules, offering online alternatives for unforeseen attendance challenges.

Everblue's student advisors provide comprehensive support throughout the training journey:

Welcome Call: Every student receives a personalized Student Success call from our team to establish a relationship, explain training procedures, and answer questions.

In Person

Support: Everblue instructors often accompany apprentices to training sites so they can be readily available during in person sessions, offering support and guidance.

Online Support: Students enrolled in online training have access to our NC based customer success team, reachable via phone, email, or live chat 5 days a week, 9 hours per day from 8 am to 5 pm Eastern Time business hours. Additionally, some of Everblue's online courses offer interactive forums to foster peer-to-peer interaction.

Continuous Improvement Through Feedback: Our commitment to building trust with apprentices yields valuable feedback that fuels program improvement. For example, based on feedback from the first Coalfield apprenticeship cohort in Huntington, WV, we identified a need for greater flexibility in online course scheduling and more hands-on training opportunities. These adjustments are actively being incorporated into the upcoming cohort offering.

Project Goals & KPIs

Metrics for Reporting

Everblue will help develop a list of metrics that indicate success of the weatherization training. These metrics will be collected by Everblue, leading partners, and the participating agencies. These metrics will include the following:

Industry Certifications Earned 150
Certification Pass Rate 75%
Course Completion Rate 85%
Participant Satisfaction Score 90%
Target Number of Individuals 120

1. All apprentice demographic data
2. # of badges earned
3. # of hours of on-the-job training
4. # of full time job offers
5. Hours worked by apprentices
6. Average apprentice salary / wages earned by apprentices
7. # of promotions offered
8. Number of homes weatherized
9. # of calls held with apprentices and the hiring employer/wx agency

DRAFT

10. Survey results rating different parts of the apprenticeship experience including data on job quality from trainees by way of postemployment surveys.
11. Longevity of employment
12. List of training courses taken
13. Number of certifications earned by apprentices
14. # of cohorts run

COMPREHENSIVE TECHNICAL TRAINING ALIGNED TO THE JOB TASK ANALYSIS (IDENTIFY AT WHAT INTERVALS WORKERS WILL RECEIVE REGULAR, COMPREHENSIVE TRAINING AS REQUIRED BY WEATHERIZATION PROGRAM NOTICE (WPN) 22-4)

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

GEORGIA REQUIRES RETROFIT INSTALLERS ARE TO BEGIN TRAINING WITHIN FIRST 6 MONTHS OF HIRE. ADDITIONALLY, RETROFIT INSTALLERS (RIT) AND CREW LEADERS (CL) ARE REQUIRED TO ATTEND COMPREHENSIVE TRAINING EVERY FIVE YEARS. ALL QCI AND EA'S ARE REQUIRED TO RECERTIFY EVERY THREE YEARS THROUGH BPI.

SPECIFIC TECHNICAL TRAINING

- TOPICS IDENTIFIED DURING MONITORING VISIT(S)
- ENERGY MODELING
- HEALTH & SAFETY. ALL H&S TOPICS IN WPN 22-7 REQUIRE SOME LEVEL OF TRAINING FOR ALL AFFECTED WORKERS, THE FREQUENCY OF THIS TRAINING IS A GRANTEE DECISION. EXAMPLES INCLUDE:
    - AIR CONDITIONING AND HEATING SYSTEMS
    - ASBESTOS
    - BIOLOGICALS AND UNSANITARY CONDITIONS
    - BUILDING STRUCTURE AND ROOFING
    - CODE COMPLIANCE
    - COMBUSTION GASES
    - ELECTRICAL
    - FORMALDEHYDE, VOLATILE ORGANIC COMPOUNDS (VOCS), FLAMMABLE LIQUIDS, AND OTHER AIR POLLUTANTS
    - FUEL LEAKS
    - GAS RANGE/OVENS
    - HAZARDOUS MATERIALS DISPOSAL
    - INJURY PREVENTION OF OCCUPANTS AND WEATHERIZATION WORKERS
    - LEAD BASED PAINT
    - EPA'S LEAD RENOVATION, REPAIR & PAINTING PROGRAM (RRP)MOLD/MOISTURE
    - PESTS
    - RADON
    - SAFETY DEVICES
    - VENTILATION AND INDOOR AIR QUALITY
        - AMERICAN SOCIETY OF HEATING REFRIGERATION AND AIR-CONDITIONING ENGINEERS (ASHRAE)
    - WINDOW REPAIR, DOOR REPAIR
    - WORKER SAFETY
        - OSHA
    - ADDITIONAL TOPICS AS DESCRIBED IN HEALTH & SAFETY PLAN
- CLIENT EDUCATION (TRAINING WORKERS TO CONDUCT CLIENT EDUCATION). EXAMPLES INCLUDE:

- Energy Savings strategies
- Program-specific information. Examples include:
  - What to expect
  - Additional resources
- Health & Safety issues

GEFA offers specific training annually based on monitoring. Training for 2024 was conducted at GCAA and it included Duct Testing - Blower door subtraction method and duct blower method, ASHRAE 62.2 and Red Calc, Weatherization Assistant review, and QCI Monitoring review

CONFERENCE Examples include:

- **Energy OutWest**
- **Building Performance Association**
- **National Association for State and Community Service Providers**
- **national Community Action Partnership**
- **National home performance conference**

GEFA staff and subgrantees are encouraged to attend NASCSP, Energy Outwest, Building Performance and Community Action Partnership trainings and conferences. GEFA Staff and subgrantees have attended or plan to attend conferences such as Energy Outwest, NASCSP, building performance and/or community action partnership conferences this program year

Other, please specify:

Describe Other Training Activities Here

5.0 – Technical Assistance

Describe the technical assistance activities included in the T&TA budget category.

Programmatic/Administration Support

GEFA offers programmatic and technical support such as review of state plan, audit policies and procedures, Health and safety plan, invoicing, reporting and Hancock.

Technical Support

Blower Door, Duct Testing, ASHRAE, Ventilation, CAZ refresher, weatherization Assistant (NEAT & MHEA), Audit review and assessment are offered through GEFA and administrated by ever blue.

Health & Safety Support Activities

GEFA offers training such as ASHRAE 62.2, CAZ Testing, Client Education, Lead Safe & OSHA 30

Monitoring

What percentage of T&TA funding is allocated to monitoring? (If defined in section B of the budget details within the annual application, include that within your description below.)

60% of Grantees T&TA budget is allocated for monitoring

Other, please specify

Describe Other Technical Assistance Activities Here

6.0 Client Education

Describe what current and planned client education materials and/or activities are included in the T&TA budget category. Only those paid for with T&TA funds need to be mentioned.

Note: This does not include training workers to deliver client education. this should be described in the Training section, above.

Client education activities prior to, during and after weatherization which address the weatherization process and energy savings details

Subgrantees give and review with clients a Client Energy Education Form. Clients are required to review and sign the Lead Safe RRP Pamphlet, Mold Pamphlet & Radon Pamphlet. Subgrantees install and review operations of CO & smoke monitors and low flow shower heads with clients. Subgrantees also educate the clients on energy conservation by talking to them about unplugging unused electrical appliances and cords, encouraging them to turn heat down to 69 degrees during the winter months and AC up in the summer.
Client education activities regarding H&S issues as indicated in WPN 22-7 ○ Air Conditioning and Heating Systems ○ Asbestos ○ Biologicals and Unsanitary Conditions ○ Building Structure and Roofing ○ Code Compliance ○ Combustion Gases ○ Electrical ○ Formaldehyde, Volatile Organic Compounds (VOCs), Flammable Liquids, and other Air Pollutants ○ Fuel Leaks ○ Gas Range/Ovens ○ Hazardous Materials Disposal ○ Injury Prevention of Occupants and Weatherization Workers ○ Lead Based Paint ○ EPA's Lead Renovation, Repair & Painting Program (RRP)Mold/Moisture ○ Pests ○ Radon ○ Safety Devices ○ Ventilation and Indoor Air Quality ▪ American Society of Heating Refrigeration and Air-Conditioning Engineers (ASHRAE) ○ Window Repair, Door Repair ○ Worker Safety ▪ OSHA ○ Additional topics as described in Health & Safety Plan •
Clients receive a WX Orientation prior to work being performed. It includes a variety of H&S material. Also, measures that the clients can apply on their own. Resources include WPN 22-7and guidance from DOE.