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**Report to  
The Vermont Legislature**

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**PLAN TO ADVANCE COORDINATION OF  
FUEL ASSISTANCE WITH WEATHERIZATION**

**In Accordance with H. 885 Sec E.324.3(b)**

**Submitted to: General Assembly**

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Commissioner**

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## Executive Summary

The Vermont State Legislature, through H.885 E. 324.3(b), directed that a plan be developed to advance coordination of Vermont's Home Heating Fuel Assistance Program (HHFAP, hereafter Seasonal Fuel Assistance or SFA) with the Home Weatherization Assistance Program (HWAP, hereafter Weatherization or WX). This plan includes assessing "programmatically and fiscal impacts" and to "maximize coordination" in pursuit of four objectives:

- 1) Reduce both energy consumption and the financial burden due to energy use (energy burden) for low-income households;
- 2) Adjust Seasonal Fuel Assistance benefits to reflect the effects of receiving Weatherization services;
- 3) Identify the incentives to participate in Weatherization even when Fuel Assistance benefits are adjusted as a result; and
- 4) Appropriately reduce Fuel Assistance benefits to households residing in "energy efficient" homes to the extent such information is available.

This report provides a discussion of the issues associated with these objectives as well as recommendations for meeting them. The discussion is prefaced by the various ways in which the two programs already coordinate their services. One important benefit of improved coordination between the two programs is the potential for repurposing at least \$150,000 of SFA funds to WX due to anticipated savings just in the first year after implementing the recommendations. Please see the attachments describing the programs in more detail.

## Introduction

In its continued attempts to improve the functioning of state agencies and to reduce budgetary burden, the Vermont State Legislature has directed (through Act 179 Section E. 324.3) that a plan be developed to advance coordination of Vermont's Home Heating Fuel Assistance Program (HHFAP, hereafter Seasonal Fuel Assistance or SFA) and Home Weatherization Assistance Program (HWAP, hereafter Weatherization or WX). The two programs (administered by the Department of Children and Families or DCF) address roughly the same population and have overlapping objectives in assisting Vermont's low-income households in reducing their out-of-pocket energy costs; although through differing mechanisms, eligibility criteria, and ultimate mandates.

*Seasonal Fuel Assistance* provides a direct monetary benefit to eligible households based on their income and the amount spent for space heating. See the SFA Attachment for a more detailed account of how eligibility is determined and benefits are calculated. A table in the discussion of Objective 3 illustrates how three prototypical SFA participants would benefit, based on the assumptions provided.

*Weatherization* provides energy efficiency improvements at no cost to eligible applicants based on available cost-effective improvement opportunities. Certain health and safety improvements may also be made. An evaluation of site-specific improvement opportunities is done by an

auditor who also develops the work scope for the installation crews. See the WX Attachment for a more detailed account of how the program is implemented.

Since many of the completed weatherization jobs involve households receiving SFA, the legislative request is to better coordinate the activities of the two programs thus more adequately leveraging their respective benefits. The challenges posed in meeting this request are discussed below under each of the objectives identified by the Legislature, followed by recommendations as to how to meet these challenges.

An overriding challenge is the difference in the scope and inherent nature of the two programs. SFA currently provides benefits to approximately 26,000 participants annually. Further, the program population is dynamic. Some participants are enrolled for one or two seasons while others are long-term participants. In marked contrast, participation in WX is a one-time event. Although exceptions are possible, the program is only able to serve approximately 1,000 households annually. Finally, while SFA participants are automatically eligible for WX, not all those eligible for WX services are eligible for SFA (or apply for SFA if they are eligible.)

These fundamental differences impose critical limits on the extent that further coordination, which is already significant, can provide additional benefits to the programs and the populations they serve.

### **Legislative Objectives**

The requested plan to better coordinate Seasonal Fuel Assistance and Weatherization activities includes assessing “programmatic and fiscal impacts” and to “maximize coordination” in pursuit of four objectives:

- Reduce both energy consumption and the financial burden due to energy use (energy burden) for low-income households;
- Adjust Seasonal Fuel Assistance benefits to reflect the effects of receiving Weatherization services;
- Identify the incentives to participate in Weatherization even when Fuel Assistance benefits are adjusted as a result; and
- Appropriately reduce Fuel Assistance benefits to households residing in “energy efficient” homes to the extent such information is available.

### **Existing Coordination Between Programs**

The SFA and WX Programs already have an established history of cross-program coordination:

- SFA annually provides WX a list of households receiving Fuel Assistance who have a “fuel liability” (have to purchase their own heating fuel or energy). The data includes: recipient contact information, housing type, fuel type, fuel supplier, seasonal consumption by fuel units (gallons, cubic feet, etc.), and fuel cost from November 1 to April 30. Prior to SFY2013 this

data was only available on paper, hand recorded by fuel dealers with copies provided to WX as requested – these are now available electronically.

- After SFY2013, SFA established electronic filing of fuel dealer consumption records. These electronic files are used to identify high consumption households based on fuel type, housing type, or housing size to improve the targeting of WX services.
- The statute governing SFA states in 33 V.S.A. § 2608 “all participants in the Home Heating Fuel Assistance Program shall be deemed to comply with any income requirements of the Home Weatherization Program.” This eligibility identification helps streamline the WX intake process benefitting both clients and program staff.
- The 33 V.S.A. § 2608 statute also requires “as a condition of receipt of benefits under the Home Heating Fuel Assistance Program, a recipient shall consent to receive services of the Home Weatherization Assistance Program.” SFA reports that, to date, no household has lost their fuel assistance benefit for failing to accept WX services.
- In March 2012, DCF submitted “Recommended Fuel Program Changes for Long-Term Sustainability” to the Governor and Legislature. WX has implemented this recommendation: “To target energy burden services to households based on energy consumption, financial need, and household composition.” This has led to a WX ‘priority ranking’ system favoring SFA recipients with the highest energy burdens, the lowest incomes, and vulnerable household members (elderly, disabled, children under age six).
- An additional recommendation was to provide energy efficiency coaching through the Sustainable Energy Resources for Consumers (SERC) program funded through the 2009 American Reinvestment and Recovery Act (ARRA) which has since expired. This “value-added” program coached household members whose homes were newly weatherized to develop and retain their own home energy efficiency skills; and to not abandon their efficiency responsibilities once the home had received WX services. Although the SERC funds no longer exist, these Energy Coaches have been retained.

Addressing the objectives of the Legislative request will further enhance the existing coordination of the two programs; will provide additional benefits to each program and to the people they jointly serve.

### **Discussion of Specific Legislative Objectives**

#### **Objective 1: Reduce energy consumption and its financial burden**

The energy consumption of a household is the sum total of their energy use, even from multiple sources, expressed in terms of the common denominator of a million British thermal units (MMBtu). The financial energy burden on low-income households however, is more complex than energy consumption. Their financial energy burden includes the cost of energy used (related to type(s) and amount of energy used), household income, number of occupants, and any special needs or resources.

The result is that there are limits to the coordination of SFA (which has a focus on reducing energy burden) with WX (which focuses on reducing energy consumption), while granting the connection between the two goals along with the merits of increasing coordination beyond what already exists or is in the process of implementation. Improvements to the efficiency and effectiveness of the WX Program, both at the administrative and service delivery levels, will have important impacts on the SFA Program by enhancing consumption savings. This will in turn reduce the financial burden of those who receive WX.

A third-party assessment of the WX program is currently underway to identify improvement opportunities in efficiency and effectiveness. This is being accomplished through an impact evaluation of its actual energy saving performance and a process evaluation of how services are delivered. The most recent evaluation (Dalhoff Study) of the program was completed in 2007. This evaluation was limited to an impact evaluation involving 74 usable data sets of completed jobs.<sup>1</sup> A number of important changes to WX have occurred since then, including an increase in the allowable average job cost from \$6,900 to \$8,500, the passage and subsequent “sun-setting” of supplemental ARRA funding, and the development of a Technical Policies and Procedures Manual designed to standardize how specific measures are installed and which diagnostic tests are conducted. It is hoped that this third-party assessment can provide more useful information with better data than the Dalhoff study was able to use. These findings are expected in early 2015 and will inform recommendations for program improvements.

## **Objective 2: Adjust Fuel Assistance benefits to reflect the effects of receiving Weatherization services**

There already is some reflection of Weatherization benefits in the amount of Fuel Assistance provided. Currently, Fuel Assistance benefits are based on a number of variables:

- Household income
- Type of housing occupied
- Type of heating fuel used
- Size of housing by number of bedrooms
- Cost of heating fuel used
- Number of eligible households
- Total funds available for benefits

These variables are accommodated through the application of “Proxy Tables” based on the average consumption for those in a given housing type and size, relative to the fuel used. These averages are based on an evaluation conducted in 1999<sup>2</sup>. The Proxy Tables will be updated in time for the FY2016 heating season, in concert with the WX impact evaluation already underway. Since the cost of heating

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<sup>1</sup> An Update of the Impacts of Vermont’s Weatherization Assistance Program, February 2007, Dalhoff Associates.

<sup>2</sup> In 1999, the Vermont Energy Investment Corporation developed a series of tables that reflected the results of applying regression analyses to consumption histories of fuel assistance recipients provided by the then Vermont Department of Social Welfare. These tables are the basis for the current Proxy Tables which are annually updated for changes in degree days and fuel costs.

fuel significantly reflects the amount of fuel used, any efficiency improvements resulting from participation in WX will be reflected and accommodated in the amount of SFA benefit<sup>3</sup>.

One important caveat is that since the Proxy Tables apply averages they cannot reliably predict actual consumption and burden for a given SFA participant. Nevertheless, since a high majority of WX participants are also SFA participants, the effects of WX are reflected in the Proxy Tables. Further, the forthcoming update to the 2007 Dalhoff WX impact evaluation will allow an update to the 1999 basis for the Proxy Tables.

How the Proxy Tables are applied to specific SFA participants is illustrated in the “Prototypical Results” table provided in the next section. This compares what might be expected when a household participates in both programs. Since the current system relies on averages rather than participant-specific consumption detail, the extent to which such specific detail can be made available in the future is the extent to which SFA benefits can more adequately reflect the benefits of WX participation.

### **Objective 3: Identify the incentives to participate in Weatherization even when Fuel Assistance benefits are adjusted as a result**

For all the caveats and challenges identified, the fact remains that applying the cost savings of Weatherization to the Fuel Assistance benefit determination process can still result in a net cost savings to all parties.

The following table illustrates both the general process and how joint participation can yield positive economic benefits. It assumes the most recent WX impact evaluation findings based on the 2007 Dalhoff study. Regardless of whether the limited impact evaluation currently underway (and any future evaluations) can provide more detailed data, adjusting Fuel Assistance benefits after Weatherization participation still can result in a net economic benefit to both the Fuel Assistance participant and the program budget. The participant, regardless of any economic benefit, also gains healthier, safer and more comfortable living quarters resulting from weatherization work.

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<sup>3</sup> Two specific groups have an additional variable applied (a reduction) based on their specific circumstances. First, households that live in Section 8 or subsidized housing that must pay for heat have their benefit reduced by 45 percent. That reduction reflects the average direct heating subsidy that the Section 8 and similar programs provide to the household. Second, households that apply for SFA but have heat included in their rent are eligible for a cash benefit. That benefit acknowledges that “heated renter” households effectively pay for home heat energy in their rent payment. These households have their benefit reduced by 70 percent to reflect their lesser “need”.

**PROTOTYPICAL RESULTS OF COORDINATION BETWEEN FUEL ASSISTANCE AND WEATHERIZATION**

Fuel Benefit determination process based on household characteristics and the effect of Weatherization Program (WX) assistance given typical savings per fuel type from the 2007 Dalhoff evaluation and adjusting for degree day and fuel cost changes <sup>4</sup>	Living alone in 1 BR apt heated with natural gas		Adult and child living in kerosene heated 2 BR mobile home		2 Adults living in 3 BR house heated with fuel oil	
	before WX	after WX	before WX	after WX	before WX	after WX
total winter heating cost	\$670	\$616	\$2,770	\$2,216	\$3,708	\$3,092
monthly household income	\$955		\$1,900		\$1,495	
% of heat cost benefit if based solely on income <sup>5</sup>	81%		66%		90%	
amount of heat benefit if based solely on income	\$543	\$499	\$1,828	\$1,463	\$3,337	\$2,783
payment rate affordable with available funds <sup>6</sup>	42%		42%		42%	
actual heat cost benefit payable	\$228	\$209	\$768	\$614	\$1,402	\$1,169
remaining heat cost to be paid by participant	\$442	\$406	\$2,002	\$1,602	\$2,306	\$1,924
<b>Net Gain By Participant</b>	<b>\$36</b>		<b>\$400</b>		<b>\$383</b>	
<b>Net Gain By Fuel Assistance Program</b>	<b>\$18</b>		<b>\$154</b>		<b>\$233</b>	
<b>TOTAL SOCIETAL GAIN</b>	<b>\$54</b>		<b>\$554</b>		<b>\$616</b>	

**Objective 4: Adjust Fuel Assistance benefits for households residing in otherwise “energy efficient” homes to the extent such information is available**

The extent to which this objective can be met is the extent to which “energy efficient” can be suitably defined. If this is restricted to homes which have participated in Weatherization, the table above addresses this objective. Broadening the definition to other housing stock (e.g. recent construction or housing addressed by other programs such as those concerned with affordable housing) may be accommodated through a more robust impact evaluation. If suitably detailed consumption histories and housing characteristics can be routinely acquired, statistical analysis may be able to utilize variables beyond those currently used in the Fuel Assistance Proxy Tables. The “type of housing” category may then be expanded (currently Mobile Homes, Multi-Family and Single Family) to include housing

<sup>4</sup> In all three prototypes, it is assumed that home heating cost reductions mirror those in the statistical analysis of actual consumption of the given housing type, size and heating fuel used based on the Dalhoff evaluation average savings. It is theoretically possible however, for a given Fuel Assistance recipient to not receive a net benefit if their burden or consumption was already very low or Weatherization was unable to address significant efficiency opportunities due to major structural defects or the presence of significant pollutants such as asbestos. Future impact evaluations also may result in different average savings or allow greater differentiation among key variables.

<sup>5</sup> The “% of heat cost benefit if based solely on income” remains the same before and after WX services since this criterion is independent of energy consumption and focuses solely on income and household size.

<sup>6</sup> The “payment rate affordable with available funds” is also fixed and is applied equally to all households, regardless of burden or consumption. It is applied to accommodate program budget limitations.



constructed to the current residential energy code. This would allow more accurate identification of the relative thermal and mechanical efficiency of the housing being treated. This would, in turn, allow a better correlation between past consumption and the amount of Fuel Assistance benefit, granting that there are other factors beyond the efficiency of the thermal envelope and mechanical equipment affecting consumption. Better and more detailed data would allow better isolation of housing energy efficiency from behavioral factors affecting heating energy consumption. Alternatively, and at less administrative cost, perhaps a benefit reduction factor could simply be applied for “energy efficient housing” in the manner that adjustments are applied for Section 8 recipients and those whose rent includes heat, once the criteria for this category can be determined.

## **Recommendations To Address Each Coordination Objective**

### **Objective 1: Reduce energy consumption and its financial burden**

Addressing this objective requires increasing the efficiency and effectiveness of both programs. Identifying such opportunities requires comprehensive evaluations and systematically addressing the opportunities presented by a given WX site.

- One important improvement to both programs is increased quality data in the form of real-time access to delivery dates and amounts of heating fuel used. For bulk fuels such as fuel oil (kerosene and propane) this requires cooperation from individual fuel dealers. While participating fuel dealers currently report the fuel type and consumption of SFA participants, they do so only annually and only report total consumption for the previous heating season. This seriously hampers attempts to assess the impacts of WX and thus participant financial burden impacts. Further, by being able to focus only on a limited set of WX work, the ability to draw conclusions about the program’s overall effectiveness is significantly curtailed, thereby affecting the SFA program performance. The current WX database upgrade to the Hancock software system provides a platform which, if expanded, could provide the necessary basis for future impact evaluations, reduce their cost and increase their timeliness.
- Weatherization should aggressively pursue receipt of Fuel Assistance participant consumption histories for recently completed work and for future participants. This information should include the dates and amounts of fuel delivered for at least 12 months prior to and after completion of Weatherization work. The existing waiver allowing access to participant consumption records may require a slight adjustment to accomplish this.
- Weatherization Program performance improvement can result from a more strategic use of existing resources. The recent implementation of the Weatherization Technical Policies and Procedures Manual standardizing installation measures and diagnostic testing is a major improvement. This should enhance program performance compared to previous years.

These recommendations, while difficult to administer in the face of budget cuts and the sun-setting of ARRA funds, are all the more important to pursue. By making the necessary investments now, these recommendations will provide more savings, more cost-effectively in the long run. Postponing their

implementation means lost-opportunities in both the short and long term.

### **Objective 2: Adjust Fuel Assistance benefits to reflect the effects of receiving Weatherization services**

Such adjustments can be made in two ways as illustrated by the Prototypical Results table above:

- WX establishes AVERAGE energy savings from its program for the categories of single family homes, mobile homes and apartments; SFA then applies the savings via its Proxy Tables as illustrated.
- SFA applies the AVERAGE energy savings determined by WX as general factors in the same manner as currently done for those participants who live in subsidized housing or whose rent includes heat.

The real dollar savings of reducing the amount of fuel assistance by either method should be deducted from the general fund budget allocation to the Fuel Assistance Program and reallocated to the Weatherization program. The total amount of the SFA budget that could be repurposed to the WX program is estimated to be between \$150,000 and \$200,000 during the first year with gradual increases in subsequent years depending on variables such as the number of SFA recipients participating in WX and documented savings from WX participation<sup>7</sup>.

In either approach, the following legislative steps are required:

- Amend the Fuel Statute to require the Secretary to establish a reasonable percentage reduction in SFA benefits for homes that have received WX services since the most recent change to the average allowable weatherization job cost, based on the most recent 3<sup>rd</sup> party impact evaluation.
- Require the Weatherization Program to identify average energy burden reduction percentages for single family homes, mobile homes and apartments for its participants based on the 3<sup>rd</sup> party impact evaluation.
- DCF's IT Division would need to provide the services /modifications to implement these fuel benefit reductions by a certain date.

### **Objective 3: Identify the incentives to participate in Weatherization even when Fuel Assistance benefits are adjusted as a result**

There are two benefits from participating in WX:

- Financial benefits resulting from a reduction in energy consumption; and
- A safer, healthier and more comfortable living environment resulting from the improvements

Both of these benefits should be highlighted in the promotional and informational literature for Fuel Assistance.

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<sup>7</sup> If 1,200 households receive WX services annually; and 80% are SFA recipients; and savings average 20%; the amount available for repurposing would be \$160,000 assuming the current average SFA benefit of \$800.

**Objective 4: Adjust Fuel Assistance benefits to households residing in otherwise “energy efficient” homes to the extent such information is available**

In the same manner that SFA benefits may be adjusted for living in subsidized housing, or having heat included in rent, residing in specifically identified “energy efficient” homes can also be adjusted. To make this possible, this category must be suitably defined. This could take the simple form of identifying specific characteristics, such as having been certified as residential energy code compliant, and tracking this information as part of the general application process.

- Amend the Fuel Statute to require the Secretary to establish a reasonable percentage reduction in SFA benefits for homes that may be classified as “energy efficient” independent of receiving WX services, based on well-defined criteria such as having been certified as meeting the residential energy code.
- Require the Weatherization Program to identify the average additional energy burden reduction percentages for single family homes, mobile homes and apartments for participants living in housing that meets the definition of “energy efficient”, based on a 3<sup>rd</sup> party impact evaluation.
- Direct DCF’s IT Division to provide the services /modifications needed to implement these fuel benefit reductions by a certain date.

**Conclusion**

With an increase in quality data, obtaining participant fuel consumption histories and average energy reduction percentages, and some IT modifications these programs can achieve increased weatherization participation leading to decreased costs in seasonal fuel assistance. This could lead to an estimated \$150,000 to \$200,000 of the SFA budget repurposed to the WX program during the first year with gradual increases in subsequent years.

## ATTACHMENT 1: Vermont’s Seasonal Fuel Assistance (SFA) Program

Vermont’s Seasonal Fuel Assistance (SFA) Program provides a single, annual benefit to income eligible households. Applications are accepted and eligibility is determined year-round by the Department for Children & Families’ Economic Services Division. SFA operates as an “entitlement program” – a benefit is granted if a household is income eligible. Benefits are issued to home owners and renters, whether they pay for heat or it included in their rent, for any type of home heating fuel or energy.

SFA is a “supplemental” benefit paying for a portion of the household’s winter heat. The balance of the heating bill is the household’s responsibility. Last winter (SFY2014) the average full-season, full-fuel-liability benefit was \$792. This paid for approximately 30% of the average household’s winter heat.

The Federal Low-Income Home Energy Assistance Program (LIHEAP) provides the majority of funds for Vermont’s SFA. Last winter LIHEAP provided \$19.1 million in funding and the state general fund provided \$8.1 million. For the current winter (SFY2015), LIHEAP is projected to again provide \$19.1 million in funding and the state has provided \$6.0 million. The average full-season, full-fuel-liability benefit is again projected to be \$792.

LIHEAP funds are provided as a block grant and as such very few rules and requirements are established by federal statute. States are allowed a tremendous degree of latitude in establishing their program requirements and mechanics. The most critical federal requirement of the LIHEAP program is that benefits must be based on client “*need*” which is established in two parts:

- Economic Need: Household’s Income – based on client’s actual income
- Energy Burden Need: Cost of Winter Heat – based on average heat cost tables
- Economic need in Vermont’s program is based on 12 levels of incomes with the lowest level defined as under 75% of the federal poverty level (FPL) and the highest defined as 185% FPL. Each level has an associated “heating cost percentage” applied. The lower the income the greater the percentage of assistance paid, as shown in the chart below:

Table I	Table II
Household Income as a Percentage of Poverty	Heating Cost Percentage
175% - 185%	27%
165% - 174%	30%
155% - 164%	33%
145% - 154%	66%
135% - 144%	69%
125% - 134%	72%
115% - 124%	75%
105% - 114%	78%
95% - 104%	81%
85% - 94%	84%
75% - 84%	87%
Under 75%	90%

The income-based “heating cost percentage” is applied against Proxy Tables which reflect the average winter heating costs for the household based on:

- Housing Type;
- Housing Size (by number of bedrooms);
- Fuel Type;
- Average Consumption; and
- Average Fuel Cost Projections

The Proxy Tables are a matrix of 48 different winter heat cost averages based on the variables above. The result is 576 variations of “need” based on economic need (the household’s income) and energy burden need (the households average heat cost).

All seasonal fuel benefits for eligible households have the above variables applied to their benefit calculation. Two specific client benefit groups have an additional variable applied (a reduction) based on their specific circumstances. First, households that live in Section 8 or subsidized housing and have a fuel liability (must pay for heat) have their benefit reduced by 45 percent. That reduction reflects the average direct heating subsidy that the Section 8 and similar programs provide to the household. This reflects the household’s lesser “need” because they are receiving heating assistance from another public benefits program.

Second, households that apply for seasonal fuel assistance and have heat included in their rent are eligible for a cash benefit (last winter that average benefit was \$195.) This acknowledges that “heated renter” households make undesignated payments for home heating energy in their rent payment. Based on that undesignated payment heated renters have their benefit reduced by 70 percent. The 70 percent reduction reflects the household’s lesser “need” because they never have to purchase heating fuel or energy.

For Additional Information please contact Richard Moffi, Fuel & Utility Program Director at [Richard.Moffi@state.vt.us](mailto:Richard.Moffi@state.vt.us), or by calling 802-769-6448.

## **ATTACHMENT 2: Vermont's Weatherization Assistance (WX) Program**

The Vermont Low Income Weatherization Assistance (WX) Program has been in existence for over 30 years and is sponsored and partially funded by the U.S. Department of Energy. Since 1990 the program has also received significant support from the Vermont WX Trust Fund which is funded through a gross receipts tax. The typical split in funding is approximately 15% Federal and 85% State. The program uses both funds in the same manner based on federal rules, with only a few minor exceptions.

The Office of Economic Opportunity (OEO) administers and oversees the WX Program. It has implemented the program for the past 30 plus years through grants to five sub grantees. These sub grantees include four Community Action Agencies (CAAs) and one Non-Profit organization. Funding is allocated to each agency annually via a formula based on the Agency's service population. Four Agencies each receive approximately 19% of the funding and CVOEO, the agency serving the higher populated Northwest Vermont, receives approximately 24% of the funds each year.

Each agency is responsible for outreach to potential clients, verifying program eligibility (see table below), performing an energy audit and a health/safety evaluation of eligible client's home, and then completing the cost-effective energy saving and health/safety improvement work identified during a site visit. OEO provides guidance (rules and policies), training, oversight and monitoring. Each completed job receives a thorough Quality Control Inspection (QCI) by the sub grantee and 10% of the completed homes are also visited by OEO for another thorough QCI. Any missed opportunities or defects found are corrected and remedial training is provided as needed.

The WX Program initially prioritizes clients living at 60% or less of the state median income. Clients are given further priority status in the following order: Fuel Assistance Recipients, those living in high energy intensity homes, and those families with members who are elderly, disabled and/or with children under the age of six. Duration on the waiting list provides additional priority points after an initial six month wait. There is a very high demand for WX services resulting in a waiting list at each agency of approximately 200-300 homes. This is equivalent to a one year wait or more for clients applying today.

The services provided by the WX Program include, as applicable:

- Health and safety measures related to the effectiveness of WX installed in a home such as correcting combustion appliance issues, issues related to excessive moisture and inadequate ventilation
- Air sealing and adding insulation to properly define the thermal envelope of the home; these measures typically provide the most energy savings and are very cost-effective. Typically, the housing of eligible applicants is under-insulated and drafty.
- Additional miscellaneous measures established to be cost-effective.

All WX measures must be evaluated and screened prior to installation ensuring cost effectiveness by producing a Savings to Investment Ratio (SIR) of 1.2 or better. This requirement assures that limited WX funding is used for the greatest overall benefit. Health and safety measures are not required to be cost effective; however they are done for the safety of the clients and to ensure the continued effectiveness of WX measures.

A recent initiative of the WX program provides enhanced client education called Efficiency Coaching. Each agency has an “efficiency coach” who is the client’s first on-site contact by the program after scheduling. The Coach explains the program, answers questions and establishes a relationship with the client to assure a smooth and effective process. The Coach also installs some electrical efficiency measures funded by partnering programs, explains what will be done by the WX program and how to operate their home more efficiently and safely through applicable conservation strategies. The “ONE TOUCH” referral tool is used to provide a personalized referral to other relevant state and local programs the client is eligible for. The WX Program is now able to provide a thorough and holistic social and energy efficiency program.

Both an impact evaluation and a process evaluation are currently in progress to identify other program improvement opportunities.

The table below provides the current income eligibility guidelines by county and household size:

## 2014-15 Weatherization Income Eligibility Guidelines

	Number of Persons in Household							
County	1	2	3	4	5	6	7	8
<b>Addison</b>	\$40,700	\$46,500	\$52,300	\$58,100	\$62,750	\$67,400	\$72,050	\$76,700
<b>Bennington, Caledonia, Essex, Lamoille, Orange, Orleans Rutland, Windham</b>	\$38,550	\$44,050	\$49,550	\$55,050	\$59,450	\$63,850	\$68,250	\$72,650
<b>Windsor</b>	\$39,000	\$44,600	\$50,150	\$55,700	\$60,200	\$64,650	\$69,100	\$73,550
<b>Chittenden, Franklin, Grand Isle</b>	\$44,750	\$51,150	\$57,550	\$63,900	\$69,050	\$74,150	\$79,250	\$84,350
<b>Washington</b>	\$40,350	\$46,100	\$51,850	\$57,600	\$62,250	\$66,850	\$71,450	\$76,050

*Guidance for accommodating additional household members is also available*

For Additional Information please contact Geoff Wilcox, Weatherization Program Administrator, at [geoff.wilcox@state.vt.us](mailto:geoff.wilcox@state.vt.us), or by calling 802-769-6499.