

WEATHERIZATION GLOSSARY

5-County

5 County Association of Local Governments

6-County

6 County Association of Local Governments

AC

Air Conditioning; reference to central refrigerated air conditioning systems

AFUE

Annual Fuel Utilization Efficiency

AHERA

Asbestos Hazard Emergency Response Act

Air Conditioning

See Attachment # 32 for Cooling Equipment Policies

Attachment # 22 for A/C installation and startup form

ANSI

American National Standards Institute

AOG

Association of Governments

ARRA

American Recovery and Reinvestment Act of 2009

ASHRAE

American Society of Heating, Refrigeration, Air Conditioning Engineers

Authorized Measures

All weatherization work completed must meet or exceed all local and state building codes.

A complete list of authorized measures is available on pages 32-35.

BRAG

Bear River Association of Governments

BWR

Building Weatherization Report

CAZ

Combustion Appliance Zone

CF

Cubic Foot

CFL

Compact Fluorescent Light

CFR

Code of Federal Regulations

Child Support

Child support or alimony payments received by an applicant must be counted as income.

A complete list of income guidelines is available as "Income Standards" in Attachment 3**Client Education**

All agencies are required to educate clients in ways to save energy such as thermostat setbacks, efficient use of draperies, lighting, appliances, day lighting, etc. They are required to provide program recipients a copy of selected client education materials and to explain the use and maintenance of items installed in the home. The goal of Client Education is to involve weatherization clients as partners in controlling their consumption, comfort and pollution and in establishing energy management habits in their household. The first educational objective with every client-customer is to identify his or her self-interest that could be connected to energy consumption. In order to establish a commitment on the part of the weatherization client, a non-binding contract between the weatherization agency and the weatherization client will be used. This Partnership Agreement can be found in **Attachment 9** as a part of the final inspection certification. Local Weatherization agency workers will continue to develop and implement a more comprehensive and effective client education program.

Computer Purchases

The purchase of computers with weatherization funds is allowable without written approval from the U.S. Department of Energy. The Division of Housing and Community Development no longer needs to approve computer purchases. Local agencies are encouraged to have back-up capabilities available.

CO

Carbon Monoxide

CPA

Certified Public Accountant

DHCD

Division of Housing and Community Development (State of Utah)

DOE

Department of Energy (US government)

DOL

Department of Labor (US government)

ECM

Electronically Commutated Motor; a highly energy efficient direct current motor

Energy Auditor

All persons who conduct on-site energy audits during the initial inspection must be a certified energy auditor recognized by the Division of Housing and Community Development. Energy Coordinators at each agency shall be certified as completing a course in residential energy auditing. Those who are not certified must be directly supervised by a certified energy auditor and shall be certified within a reasonable period of time as determined by the Division of Housing and Community Development. Local weatherization agencies will need to send the employee to a certified residential auditor training workshop or coordinate training with the Division of Housing and Community Development. Local agencies may contract out energy audit services to other certified energy auditors if needed.

EPA

Environmental Protection Agency (US government)

ERV

Energy Recover Ventilator; is a type of air-to-air heat exchanger that can transfer both sensible and latent heat.

Factory Built Home

Factory Built Homes are manufactured housing, mobile homes, or modular homes as defined by both the International Building Code and Utah Uniform Building Standards Act. Factory Built Homes have a metal chassis with the exception of modular which are conventional light framed construction but constructed in components off site.

File Requirements

Files will be maintained for each eligible applicant. These files must always include a completed "Application for Home Weatherization", income documentation worksheet, a "Building Weatherization Report" (BWR), and a NEAT Energy Audit. A copy of the Privacy Act Statement **must** be given to applicants upon their initial receipt of the application form. An Indoor Air Quality and Safety checklist (*see Attachment 20*) **must** be completed for each unit prior to weatherization and be included in the client file. Pre and post blower door test results, furnace tune-up sheets, waiver authorizations, completed final inspection sheets, weatherization partnership agreement, O&M Checklist and omitted priorities documentation must also be included. ***Additional information is available on page 49-51.***

Fuel Conversions

Heating fuel conversions are allowable on a case-by-case basis. A NEAT Audit or Fuel Conversion Worksheet must be completed (*See Attachment 22*) to determine cost effectiveness and included in the client file. Installation costs for duct delivery and return runs must be included in the calculations. In renter occupied dwellings where the weatherization applicant pays the utilities, property owners must contribute a minimum of 50% of the fuel conversion cost and follow other rental property guidelines. Fuel conversion will not be permitted where the property owner pays the utilities.

Fuel Histories

Agency records should include past fuel consumption information for the previous twelve months for each applicable client. Only metered utility data is required to be collected. Homes weatherized with metered heating utility service should have the account number on the BWR. Due to problems with obtaining such records from new move-ins, renters and customers of unregulated energy suppliers or utilities, full compliance will not be enforced. This is necessary for overall program evaluation.

Furnace Replacement

Approval from the Division of Housing and Community Development is not required for the installation of replacement furnaces. All 60% efficient furnaces (atmospheric burner, standing pilot light) discovered during normal weatherization activities or crisis situations, regardless of the fuel type, **will** be replaced with 90% units whenever possible. If natural gas is in the area, every effort should be made to utilize this fuel source. Emergency crisis funds, in conjunction with other programs, can be used to run the gas piping from the street to the house. If gas is not available, other fuel types should be cost calculated and the most efficient fuel type used. Furnace efficiency modifications will not be allowed. When installing or servicing furnaces, pleated filters are preferred, especially in 90%+ units in order to reduce clogging of the secondary heat exchanger. The same applies to furnaces with A/C coils. Washable filters are to be used when there is absolutely no other alternative and/or the unit or duct work cannot accommodate a pleated filter or filter box.

Furnace Replacement in Rentals

Replacement of heating equipment in rental units will be allowed based on the following criteria: Only 60% efficient units (atmospheric draft & standing pilot) in good current operating condition will be eligible. The owner is required to pay 50% of the agency cost, (material, labor and associated costs) to install a 90% unit

(95% is preferable.) Replacement of existing 80% efficient furnaces in rentals will be based on the age and on the cost of repairing the existing equipment. If an existing unit is more than ten years old and the cost to repair the furnace will be greater than \$300, a new 90-95% furnace may be installed. Additionally, if repairs are not needed on an 80% furnace, but the furnace is 15 years or older, LIHEAP Energy Crisis funds will be used to replace the furnace with a 90-95% furnace, or if the furnace is less than 15 years old the NEAT audit may be used for a replacement provided the SIR is 1.0>. In all cases the owner must be willing to pay 50% of

the agency cost, (material, labor and associated costs) If the property owner with a qualifying furnace declines to participate in the furnace cost sharing, no other weatherization measure requiring a cost share will be installed on the dwelling unit. All contribution funds are to be collected from the rental property owner before agency starts the work. ***Water heater replacements in rental units will not be allowed.*** Any contribution by the owner or non-profit housing provider will not be considered program income. If the building owner or non-profit housing provider declines participation, the local Weatherization agency may complete other basic Weatherization improvements not subject to contribution participation. If the building owner or non-profit housing provider is not in a financial position to contribute or qualifies for Weatherization himself/herself, a rent freeze may be negotiated with the local Weatherization agency in lieu of financial contribution. *The Division of Housing and Community Development must be notified regarding all rent freezes negotiated with landlords and any other variances to this policy in writing.*

Furnace Tune-up

All furnaces not replaced are required to be tuned, Cleaned and de-rated. This tune-up must be performed on **all** gas combustion appliances. A copy of the Warm Air Furnace forms (**attachment 22**) must be included in the client file.

Funding

Department of Energy	DOE	July 01, 2010-June 30, 2011
Department of Energy	ARRA	April 01, 2009 –March 31, 2012
LIHEAP		On-going October 1 each year
Rocky Mountain Power		March 01, 2010 – February 28, 2011
Questar		January 01, 2010 – December 31, 2010

Funding Categories

Administrative costs

Administrative cost allowances are determined by the amount of grant funds received by the local weatherization agency. Local weatherization agencies receiving less than \$350,000 in DOE funds will be allowed to use up to ten percent of their grant funds for administrative purposes. This is necessary because of the limited administrative funds available from the LIHEAP program allocation. Additional amounts may be allowable providing the grantee uses less than their five percent share of the administrative allowance.

While the Weatherization Assistance for Low-Income Persons Program Regulations, 10 CFR Part 440, do not clearly define what is to be included in the administrative cost category, certain expenditures incurred in carrying out the duties of this program, by exclusion from other categories, would properly be charged as administrative costs. Examples include:

- telephone
- postage
- lease of copying machines
- office supplies
- monthly utilities
- building space rented or leased (to be treated as a percentage of total building overhead based on the percentage of space used for the Weatherization Assistance Program). This does not include storage space for materials

- space costs (must be reasonable and may be required to be competitive with other similar and commercially available properties depending on property ownership)
- management/administrative consultants
- legal advertisements
- legal costs excluding those incurred in taking legal action against grantee
- travel expenses for administrative and clerical staff and salaries of administrative and clerical staff (based on the percentage of time devoted to the management of the DOE Weatherization Assistance Program)

Additional information is available on page 10

Program Operation Costs

Program Operation costs are more clearly defined in the Federal Register, June 5, 1995, 10 CFR Part 440.18(c) and 19(a). Allowable expenditures under program support include the costs that are directly related to physically installing the materials on homes and can be divided into five areas:

- a. Labor
- b. Transportation
- c. Tools and equipment
- d. Supervision
- e. Storage of weatherization materials and equipment

Additional information is available on page 11-12

Financial Audit

An OMB circular A-133 financial audit is required for each local weatherization agency on a yearly basis. One copy of the audit must be submitted to the Division of Housing and Community Development within thirteen months after the close of the agency fiscal year. Yearly CPA audit expenses including those required under the Single Audit Act are now assigned to a separate budget category. In previous years such yearly audit expenses were an administrative expense. Now they are to be treated much like the liability insurance category. A local weatherization agency will identify liability insurance cost estimates and budget for those expenses out of the overall agency weatherization budget to fund this program requirement.

Training and Technical Assistance

Salaries, per diem, and travel costs of agency staff attending workshops, conferences, and quarterly meetings should be charged under the budget category "Training and Technical Assistance (T&TA)." An acceptable percentage of T&TA wages must be charged to direct weatherization personnel such as weatherization coordinators, estimators, inspectors, on site workers, delivery personnel, etc., during such time as they are in attendance at required training.

GFCI

Ground Fault Circuit Interrupter

Grantee

Person or agency issuing a grant. For the purposes of this document DHCD is the grantee

Green Sticker

A safety program in Utah to ensure natural gas fired appliances are adjusted to fire properly at altitude.

HAUC

Housing Authority of Utah County

HEPA

High Efficiency Particulate Air

H&S

Health and Safety

HRV

Heat Recovery Ventilator; is a type of air-to-air heat exchanger that can transfer sensible heat only.

HVAC

Heating, Ventilation, Air Conditioning

IAQ

Indoor Air Quality

IBC

International Building Code

ICC

International Code Council

IECC

International Energy Conservation Code

Income

A complete list of income guidelines is available as “Income Standards” in Attachment 19

Inventories

Agencies shall establish procedures for inventory control of materials and equipment. Those procedures will include: accurate up to date posting of material check-in and check-out logs, accurate cost accounting procedures and detailed verification of materials installed on each home. At least an annual comprehensive physical inventory count shall be made by the agency using a disinterested person to oversee and assist in the count as a guarantee of inventory accuracy. On an annual basis agencies will provide the Division of Housing and Community Development with a list of all equipment with purchase prices greater than \$500 per equipment purchase. The Division of Housing and Community Development must approve any disposal of equipment where the weatherization program’s initial share exceeded \$500 in writing in advance.

IRC

International Residential Code

IWTC

Intermountain Weatherization Training Center

Knob and Tube Wiring

Knob and tube wiring can be very common in many of the older homes in the weatherization housing stock. The National Electrical Code recommends against insulating over or around knob and tube wiring; doing this can cause the wiring to overheat and increase the possibility of overheating and fire. The presence of knob and tube wiring does not eliminate the possibility of insulating but may limit what can be done. Without special testing and inspection procedures, an attic with knob and tube wiring can still be insulated. Care must be taken not to cover the wiring. Insulation will need to be installed up to the bottom of the wiring and never over it. This can be accomplished by blowing insulation to a uniform depth in the attic, taking care to make sure the wiring is not covered with insulation. Batt insulation can be installed under the wiring. The trench method of insulating may be used as well, or other combinations of methods can be implemented. The first few inches of insulation reduce the greatest proportion of heat loss, and it is imperative that attics with knob and tube wiring be insulated, even partially. Walls with knob and tube wiring cannot be insulated under normal circumstances unless special inspection and testing procedures are followed.

Ceilings and walls containing knob and tube wiring can be fully insulated providing every circuit involved has been tested with a device such as the Sure Test Branch Circuit Analyzer that measures the voltage drop at full load (15 amps) and that drop does not exceed 5%. According to the National

Electrical Code, if the voltage drop in a branch circuit exceeds 5%, the circuit may be defective. A voltage drop of up to 10% will be allowable if a visual inspection of the wiring is completed in addition to the branch circuit voltage drop test and procedures established by the Philadelphia Housing Development Corporation (PHDC) as outlined in the September/October 1995 issue of Home Energy Magazine are followed.

LIHEAP

Low Income Home Energy Assistance Program

LSW

Lead Safe Weatherization

Local Agencies

1. **Bear River Association of Governments**, 170 North Main, Logan, Utah 84321, (435) 752-7242. The AOG serves Box Elder, Cache and Rich counties. The program has operated in this area since 1976, first through a CAP and now through the AOG. The agency works with the Shoshone Indian tribe.
2. **Davis County Health Department - Tri -County Weatherization Program**, Freeport Center Bldg. A16-D Clearfield, Utah 84016 The agency serves Davis and Morgan Counties and has done so since September 1976, first as a CAP and now under direct county government. Beginning in May of 1997 this agency underwent a name change and assumed the responsibilities of weatherization in Weber County.
3. **Salt Lake Community Action Program**, 321 West 800 South, Salt Lake City, Utah 84101, (801) 359-2444. The CAP serves Salt Lake and Tooele counties and in 1984 took over service to the Goshute Indian Tribe in Ibapah, Utah. The CAP has administered the program since 1976.
4. **Housing Authority of Utah County**, 735 So. University Ave. Provo, Utah 84601-5184, (801) 344-5184 Ex. 307. Previously, the contracts for all weatherization activities were held by the Mountainlands Association of Governments and the work was contracted to the Housing Authority (HAUC). The contract is now held by the Housing Authority of Utah County (HAUC), 240 East Center Street, Provo, Utah 84606, (801) 373-8333. The HAUC serves Utah, Wasatch and Summit counties and has done so since March 1976.
5. **Six County Association of Governments**, Sevier County Administration Bldg., 250 North Main, Richfield, Utah 84701, (435) 893-0740. The AOG serves Juab, Millard, Piute, Sanpete, Sevier and Wayne counties and has done so since March 1976. On April 1, 1987 the agency started serving the Paiute Indian tribe located with the Six County boundaries.
6. **Five County Association of Governments**, 2344 W Industry Way #2, Cedar City, Utah 84721, (435) 586-0585. The AOG serves Beaver, Garfield, Iron, Kane and Washington counties and has done so since March 1976. In addition, the AOG took over administration of the weatherization program for the Paiute Indian tribe in 1983. On April 1, 1987, the AOG began serving only those portions of the Paiute Indian tribe located within the Five County area.

7. **Uintah Basin Association of Governments**, 330 East 100 South, Roosevelt, Utah 84066, (435) 722-5205. The AOG serves Daggett, Duchesne, and Uintah counties and has done so since March 1976. In 1981 it took over service to the Ute Indian Tribe in Ft. Duchesne.
8. **Southeastern Utah Association of Local Governments**, 375 South Carbon Avenue, Price, Utah 84501, (435) 673-5448. The agency serves Carbon, Emery, Grand and San Juan counties. The program was operated by the Southeastern Utah Community Action Agency from March 1976 through 1984 when it was then transferred over to the Southeastern Utah Association of Local Governments (SEUALG). The Utah Navajo Development Council (UNDC) subcontracted the program for the Utah portion of the Navajo Reservation through the Southeastern Utah Community Action Agency from March 1976 until 1984 when UNDC

was funded directly by the state. On July 1, 2000 weatherization for the Utah portion of the Navajo Reservation was consolidated into the existing SEUALG Weatherization program. The agency also works with the Ute tribe in this area.

Local Agency Responsibilities

A complete list of local agency responsibilities is available in pages 23 - 25

MHEA

Manufactured Home Energy Audit; a component of the Weatherization Assistant software. For detailed description of energy auditing software see NEAT Audit.

Monitoring Schedule July 01, 2010 - June 30, 2011

AUGUST 29-SEPT.2, 2010	Bear River Association of Governments
SEPTEMBER 13 -16, 2010	Uintah Basin Association of Governments
SEPTEMBER 27-30, 2010	Davis County Health Dept. - Tri-County Weatherization
JANUARY 10-13, 2011	Salt Lake Community Action Program
FEBRUARY 7-10, 2011	Housing Authority of Utah County
MARCH 7-10, 2011	Five County Association of Governments
MARCH 28-31, 2011	Six County Association of Governments
MAY 2-6, 2011	Southeastern Utah Association of Local Governments

A copy of the monitoring instrument and schedule is available in Attachment 11

MSDS

Material Safety Data Sheet

NEAT Audit

The NEAT Audit as approved by the Division of Housing and Community Development and the DOE shall be used by all agencies in determining the correct priority of Weatherization improvements for each dwelling unit until additional audits are approved. Each NEAT analysis will remain in the client file. Prices paid for materials and labor are to be updated twice yearly or when a significant change in a factor occurs.

NEAT is a residential energy audit developed by Oak Ridge National Laboratories for the U.S. Department of Energy for use in the Weatherization Assistance Program. The NEAT Audit is an approved waiver audit which, when used, allows local Weatherization agencies to vary from the 40% minimum materials requirement for each home the NEAT audit is applied to completed during the 2008-2009 program year, and thus the 40% materials minimum will not apply. Uniform material life standards will be established for all local agencies. Only NEAT Audit version 8.6 is acceptable for use and only the NEAT Audit forms contained in **Attachment 7** shall be used during the 2011-2012 program year. Other forms may be used if

prior approval is received from the state. The Division of Housing and Community Development completed the NEAT re-certification process with DOE during the 2009-2010 program year.

In carrying out Weatherization projects, first priority is given to stopping infiltration by repairing broken windows, patching roofs and walls, caulking cracks and joints and weather-stripping doors and windows; a second priority is given to installing a balanced combination of cost effective energy-conserving home improvements including insulation of attics, floors, walls, foundations, and exposed heating ducts, furnace efficiency modifications, etc. The priority listing of activities (after O&M's and after infiltration has been stopped) will be based upon NEAT calculations and is limited to those listed in Section C.

Under NEAT, a measure shall only be implemented where the savings to investment ratio (SIR) of that measure is a minimum of 1.0. If the client rejects a measure recommended for implementation by the local agency, the total cost of that measure is to be subtracted from the total cost of all measures estimated by that agency. In other words, the total amount of money estimated to be spent on the dwelling unit for all measures would be reduced by the amount of the rejected measure. This will prevent applying the funds that should go towards more cost effective measures to less cost effective measures.

With NEAT, when the savings to investment ratio (SIR) is lower than 1.0 on DOE, LIHEAP, and Rocky Mountain Power projects, the local agency may proceed with the installation of those measures providing the client voluntarily supplements the agency funds on a buy-down basis. A buy-down is allowable only when all measures with an SIR of more than 1.0 have been installed. In effect this will put the agency SIR at or above the minimum 1.0 SIR. Buy-down payments by a client should be made to the vendor where possible and not the Weatherization agency or agency personnel. Payments made to the agency should be listed as client participation on the BWR and also included in the total costs section of the BWR as well. Such payments are not to be considered program income. Payments by check or money order are preferred. Cash payments are discouraged but allowed providing the agency adheres to all applicable cash management principles. Documentation of payments must be included in the client file. Client co-payments are not to be required on measures that have an SIR greater than 1.0 or for any Health & Safety item. Similarly, if the expenditures for a home are approaching the maximum allowed amount and insufficient funds remain to complete the next item or items on the priority list, the client may make up the remaining amount needed to complete the measure(s). This may occur only when the client rejection provision stated previously is adhered to.

Additional Audit information is available on pages 41-42.

NEC

National Electrical Code

NFRC

National Fenestration Rating Council

O & M items

1. Install 6 mil Polyethylene vapor barriers on floor in crawl space.
2. Install water heater blankets as outlined in Weatherization Guidelines. Complete a Water Heater Safety Check List on all gas fired water heaters. (attachment 22)
3. Replace furnace filters and leave an extra set. Washable filters used as a last resort.
4. Seal all transverse seams and other significant leakage areas in heating ducts and returns with appropriate mastic.
5. Insulate accessible-heating ducts located in unheated spaces.
6. Install rim/band joist insulation

7. Check home for moisture problems and correct (where possible).
8. Properly prepare and weatherize attic scuttle door and opening.
9. Cover evaporative and refrigeration cooler vents.
10. Replace broken or missing glass and re-glaze windows as needed.
11. Prime or seal any bare wood installed during weatherization process.
12. Install energy saving showerheads and low flow faucet aerators.
13. Refrigerator testing & replacements. Test all refrigerator(s) with Digital Power Meter for a minimum of 72 hours. Replace if the SIR is 1.0 or greater. Clean up the work site.
15. Explain use of any installed setback thermostats or timers.
16. At least one battery operated smoke alarm will be installed on each floor outside sleeping rooms
17. Complete a Furnace Start up and Performance Check Sheet on all new installed furnaces. Complete a Warm Air Furnace Summary or Long form on ALL not replaced. (attachment 22)
20. Complete and explain Furnace Client Checklist with client, sign and retain a copy in the client file. (**Attachment 22**)
21. Have client complete the indoor air quality checklist.
22. Install CFL's in all light fixtures that are in use more than two hours per day

OMB

Office of Management and Budget (US government)

OSHA

Occupational Safety and Health Administration (US government)

PAC

Policy Advisory Committee

Poverty Guidelines

Poverty Income Guidelines Effective 1/20/2011

150% of the Poverty Level

<u># In Household</u>	<u>Yearly Income</u>	<u>Approximate Monthly Income</u>
1	\$ 16,335	\$ 1,361
2	\$ 22,065	\$ 1,839
3	\$ 27,795	\$ 2,316
4	\$ 33,525	\$ 2,794
5	\$ 39,255	\$ 3,271
6	\$ 44,985	\$ 3,749
7	\$ 50,715	\$ 4,226
8	\$ 56,445	\$ 4,704

150% of Poverty

For family units with more than eight members, add \$5,730 for each person yearly, or approximately \$478 for each person monthly.

Previously Weatherized Units

No DOE grant funds shall be used to install or otherwise provide weatherization materials for a dwelling unit weatherized previously with grant funds unless such unit has been damaged by fire, flood, or an act of God and repair of the damage to weatherization materials is not paid for by insurance. Care should be taken to avoid the indiscriminate re-weatherization of housing units previously weatherized with non-DOE administered funds. The exception to the re-weatherization rule is that dwelling units weatherized prior to September 30, 1994 may be re-weatherized if the initial weatherization work was only partially completed or if the home needs additional work to bring it up to current weatherization standards.

Additional information is available on Page 54

Priority List

- a. The household has Elderly or Disabled living in residence. (25 points) _____
- b. If the annual energy burden reaches:
 - 15% of qualifying income, add 20 points
 - 20% of qualifying income, add 30 points
 - 25% or more of the qualifying income add, 40 points

- c. Preschool children reside in the household add 3 points for each child under the age of six . _____
- d. For every 6 months the application has been on file add 10 points. _____
- e. Prior weatherization of the dwelling unit subtract 10 points. _____

- f. Where household income is less than 75 percent of the poverty level add 20 points. Where household income is between 75 percent and 100 percent of the poverty level add 10 points.

TOTAL POINTS

Procurement Procedures

The following procurement procedures should be followed for procurement of materials, contract labor, and equipment unless otherwise required by local, state, or federal law.

Small Purchase Procedures occur when total cumulative purchases of an item will amount to \$100,000 or less for AOG's, Native American Tribes, and non-profit agencies. All standard procurement procedures must be followed with the exception of the formal bid process. All potential suppliers providing bids must receive a written copy of the minimum specifications required. Prices are to be solicited from an adequate number of qualified sources (usually at least three). Telephone solicitations are acceptable providing that adequate precautions and documentation is provided. **All small purchase solicitations shall be documented and maintained on file at each agency.** *Additional information is available on page 30-31.*

Rental Property

Both owners and renters shall be eligible to receive weatherization assistance. This also includes subsidized housing. Neither group shall be given additional priority over the other except as outlined in the Weatherization Guidelines. In the case of renter occupied dwellings, the goal of any weatherization project must be to assist low-income tenants as much as possible without excessive enrichment to the property. Whenever renter occupied dwellings are weatherized, a landlord/agency agreement (see Attachment 6) must be obtained from the property owner before work can begin. The agreement must be included in the applicant's file. Under certain circumstances, owners of rental dwellings will be required to contribute matching funds towards the weatherization of rental units. *Additional information is available on pages 55-58.*

Reporting

Through WebGrants, a separate monthly report in electronic format (*Attachment 8*) must be attached for all DOE, LIHEAP, Questar Gas and Rocky Mountain Power funds requested. Payments cannot be made on any contract without using WebGrants or the submission of these report/reimbursement forms. Additional supporting documentation such as local agency financial documentation must also be attached to these requests. When there has been Weatherization and/or furnace crisis completions during the month, LIHEAP reports must also include one or both Attachment A & B supplementary reports as listed in the LIHEAP contract. A CD containing all updated electronic reports, forms and refrigerator requests will be sent out to the local agencies at the beginning of each program year. These new forms must be used at the beginning of the DOE program year (July 1 of each year). Old forms will be returned un-reimbursed. The \$6,500 maximum average applies only to DOE funds, separately or combined with another funding source. If they are combined, a completion can be credited to both funding sources. Homes completed with LIHEAP funds will be reported separately even if other non-LIHEAP funds were used on the project. LIHEAP completions will not be subject to the \$6,500 maximum average and other selected rules.

Monthly reports and reimbursement requests for DOE, LIHEAP and Rocky Mountain Power and Questar Gas funds must be received via WebGrants by the **25th of each and every month** once there has been activity on that contract. If the 25th falls on a weekend or holiday, the reports will be due at the close of business on the following business day. Reports and reimbursements submitted after the 25th, or reports submitted without BWR's will be returned to be added to the next month's report. Amended and or correcting reports cannot be accepted. Monthly reimbursement requests will not be honored without the accompanying BWR's. The number of BWR's must equal the number of dwelling units being claimed on the monthly report. If a unit is claimed on a monthly report, as either a DOE or LIHEAP completion, the BWR must list DOE /LIHEAP materials and or labor to be counted. Total Rocky Mountain Power BWR addendum dollar amounts must equal the amount request on the monthly report for reimbursement.

If no homes are reported after two consecutive months, the Division of Housing and Community Development reserves the right to withhold payment requests. If the production of homes in relation to the amount of program expenses becomes out of balance for more than 2 months, taking into account advances received, the Division of Housing and Community Development may also reduce or withhold payment requests.

RFP

Request for Proposal

RMGA

Rocky Mountain Gas Association

RMP

Rocky Mountain Power

RRP

Renovation, Repair and Painting Program; regulated by the EPA 40 CFR part 745

Safety Equipment

Local agencies are required to supply adequate safety equipment to their employees.

A complete listing of this equipment is on pages 38 - 39 and in Attachment 31

Shelters

Shelters may also be eligible for weatherization services. Shelter means a dwelling unit or units whose principal purpose is to house, on a temporary basis, individuals who may or may not be related to one another and who are not living in nursing homes, prisons, or similar institutional care facilities. For the purpose of determining how many dwelling units exist in a shelter, the local weatherization agency may count each 800 square feet of the shelter as a dwelling unit or it may count each floor of the shelter as a dwelling unit. Documentation will not be required to certify that the dwelling is a shelter. There will also be no requirement to document the eligibility of shelter residents.

SEER

Seasonal Energy Efficiency Ratio

SEUALG

Southeastern Utah Association of Local Governments

SHPO

State Historical Preservation Office

SIR

Savings to Investment Ratio; ratio shows if the cost of the measure will pay back over the life of the measure.

Site Built Home

Site built homes are structures not considered factory built homes. This would include any factory built home that has been altered with conventional light framing.

SLCAP

Salt Lake Community Action Program

State

State of Utah

Sub-Grantee

The recipient of a grant

Subcontractors

Local agencies may use private contractors to install weatherization materials. The use of contract labor is necessary in some areas where local agencies do not want to assume any risk for weatherization activities, the number of agency crews are limited, or agency crews may lack the necessary expertise. However, these contractors must hold the appropriate Utah Contractor's License (if the service they provide requires a license). They must also carry comprehensive general liability insurance throughout the contract period of at least \$500,000 and vehicle insurance of \$100,000/\$300,000. Workers employed by a contractor must be covered by a state approved Workers Compensation insurance policy during the entire time they are working on weatherization projects. Subcontractors who are sole proprietors must either provide evidence of Workers Compensation Insurance or provide a waiver issued by an insurance agent. All contractors and their employees who work on weatherization projects must attend a Weatherization introduction workshop before they complete any work under their contract with the local weatherization agency. This workshop will be made available by the local Weatherization agency, and if desired, with the assistance of the Division of Housing and Community Development.

Swamp Cooler

Evaporative Cooler

TBD

To Be Determined

T&TA

Training and Technical Assistance

Trailer Skirting

Approval from the Division of Housing and Community Development is required before trailer skirting is installed.

Tri-County

Tri-County Weatherization, a division of Davis County Health Department

UBAOG

Uinta Basin Association of Governments

Vehicles

The purchase of motor vehicles is allowable with written approval from the U.S. Department of Energy. AOG's and county governments are encouraged to use state vehicle bids for purchases. The following procedures also generally apply to the purchase of other weatherization equipment. Preferably before, but at least simultaneous to the solicitation for bids, the local agency should provide the Division of Housing and Community Development with:

- Justification, that is, a discussion of the reasons why the purchase is necessary. For example: Present vehicle is in generally poor mechanical condition, has high mileage, and is five years old.
- The solicitation document, that is, the written minimum specifications for the new vehicle. It must be noted that the vehicle with the lowest price that meets the minimum specifications will be selected. Extra features that exceed the minimum specifications will only be taken into account if there is an acceptable written and comprehensive method of rating those extra features that is included in the bid document and is a part of the bid process.
- An identification of the source of funds and a discussion of program impact, if the item is not already budgeted for in the original Guidelines.

Local agencies can also purchase used vehicles from other local weatherization agencies. The local weatherization agency purchasing the used vehicle should write a letter to the Division of Housing and Community Development requesting permission to purchase the used vehicle using the standard vehicle request format.

Additional information is available on page 28-29

Vehicle Disposal

Many agencies would like to dispose of aged and worn out vehicles. Authorization to dispose of a vehicle must be received in writing by the Division of Housing and Community Development before the actual disposal takes place. Where current vehicle value exceeds \$5,000, written DOE approval must be obtained before disposal can occur. Prior to disposing of a vehicle, the Division of Housing and Community Development needs the following information:

- (1) Vehicle description and identification.
- (2) Date and cost of initial purchase.
- (3) Approximate current market value.
- (4) The reason for disposing of the vehicle.
- (5) Whether the agency has advertised the vehicle to other weatherization agencies in the state.
- (6) The intended use of any proceeds resulting from the disposal.

VOC's

Volatile Organic Compounds; are emitted as gases from certain solids or liquids

Walk Away

A common term for Deferred Service

WAP

Weatherization Assistance Program

Water Heaters

With water heaters, lack of hot water is considered a crisis if the household contains occupants who are either elderly, disabled, children under the age of six or other factors where lack of hot water may be considered a crisis.

WPN

Weatherization Program Notice; DOE guidance issued to grantees

WX

Weatherization

Windows

Windows may be installed when the SIR is 1.0 or greater. Only low-E double pane vinyl windows may be installed with a maximum U-value of .35. Using aluminum prime windows for replacements is no longer an option. All windows must be labeled with the “ANSI” and “NFRC” sticker according to Federal labeling requirements. Note: On the NEAT audit, windows of the same type on the same wall segment may be averaged and entered as one unit on that wall. Care must be taken when adding or averaging