

April 15, 2020

DOE WAP 2020 APPLICATION

AMANDA MARCOTT-THOTTUNKAL
SENIOR ENERGY PROGRAMS MANAGER



ZOOM PANEL

Audio Settings ^



Chat



Raise Hand



Q&A

Leave Meeting



OUTCOMES

- Learn what's expected in the DOE WAP 20 process, and what's changed from DOE WAP 19



APPLICATION CHECKLIST

1. Review Award Letter
2. Designate Leads
3. Pull Historical Data
4. Develop Plan
5. Collectively Communicate and Review Plan
6. Complete OKGrants Forms
7. Complete any ODOC Forms (none required this year)
8. Upload Required Documentation
9. Double & Triple Check
10. Submit Application



1. REVIEW AWARD LETTER

- Award letter sent to ED by ODOC Executive Secretary
- Forwarded by ODOC Planner to Program Manager and Chief Financial Officer
- Award letter contains BOTH financial and programmatic requirements to follow during application planning and processing

***NEW – Increased T/TA base award**

***NEW – New increased ACPU**

***NEW – No requirement to upload either Training Plan or
Setup Library (as part of application –will be different process)**

***NEW – No award by county**

***NEW – COVID-19 Deferred Homes List Upload**



T/TA AWARD

Several factors contributed to awarding T/TA funds before a Training Plan

- We are revamping the Training Form, and combining it with the staffing form
- We know everyone could use more training funds than other years, due to increased demand for online training and T/TA to pay for salaries
- We awarded a \$2,000 base salary to all agencies, and then an additional \$1,000 per employee on staff that we had on file
- Additional funds will be awarded based on Training Plan at a later date



ADMIN

Increased admin % overall



PY 20 ACPU & H&S

For PY 2020, Health and Safety funds may not be initially budgeted higher than 14% of Program Operation expenditures (Materials and Program Support), nor the Average Cost Per Unit (ACPU) of \$7,669. As needed, later in the program year, you may request ODOC permission to exceed either the H&S or ACPU threshold.



NEW CONTRACTUAL LANGUAGE – CONTRACT PART II

- I. Concurrent with quarterly progress report review, ODOC will also review each Subgrantee Recipient's year to date Average Cost Per Unit (Program Support plus Materials divided by the number of completed units). If, at the end of the second quarter of the Program Year, the Average Cost Per Unit exceeds the current Program Year's threshold (found in the Community Action Agency Implementation Manual), and the Subgrantee Recipient does not have prior written, explicit ODOC permission to exceed the Average Cost Per Unit, the Subgrantee Recipient will be placed immediately on reimbursement only. ODOC may also require the Subgrantee Recipient to submit a corrective action plan if there is less than 75 percent of planned production completed. At the end of the Program Year, if ODOC determines that the Subgrantee Recipient has exceeded the Average Cost Per Unit without prior written, explicit ODOC permission to do so, the Subgrantee Recipient may be required to pay back all program funds until the ACPU is below the required threshold.



2. DESIGNATE AGENCY LEADS

- Determine who is responsible for what part of the application process and when



3. PULL HISTORICAL DATA

Look at the last three year's data for DOE/DHS to inform your planning for this year:

- How many units completed
- ACPU
- Training Funds Spent
- H&S Funds Spent
- Any funds unspent?
- Line items with frequent budget revision requests



4. DEVELOP PLAN

What is your agency's weatherization plan?

1. Production plan (Management Plan)
 - a. Determine how many units total
 - b. Determine how resources will be spent by county

2. How funds will be spent (Budget is a Plan)
 - a. How much funds it will take to complete each home
 - b. Supporting costs (audit, admin)

3. How Reporting needs will be met



ONE WAY TO START A BUDGET

1. Budget Full T/TA and Admin Award
2. Determine budget for Insurance and Audit (these are not factored into ACPU)
3. Take remaining amount and multiple by 14% (to determine max H&S)
4. Subtract the 14% from the remaining amount, leaving you with the funds available for Program Support and Materials
5. Divide by an estimated ACPU (e.g. \$7669) to determine minimum number of units your agency needs to complete.

A. Transportation	
B. Tools and Equipment	
C. On-Site Supervision	
D. Labor: Payroll	
E. Labor: Subcontracted	
F. Storage	
G. Office Expenses: Program Support	
H. Total Program Support	
I. Materials	
J. Insurance	
K. Administration	
L. Audit	
M. Training & Technical Assistance	
N. Health and Safety	
O. Program Outreach	
P. TOTAL	



QUICK BUDGET EXAMPLE

Admin = \$10,000

T/TA = \$5,000

Remaining for Program Support, Materials, Audit, Insurance = \$85,000

Total Award = \$100,000

- $\$100,000 - \$10,000 - \$5,000 - \$1,000 - \$300 = \$83,700$
- $\$83,700 \times 14\% \text{ (H\&S)} = \$11,718$
- $\$83,700 - \$11,718 = \$71,982$ (Program Support & Materials)
- $\$71,982 / \$7,669 = 9.3860$ (minimum of 10 homes to be within ACPU)



5. COMMUNICATE AND REVIEW PLAN TOGETHER

- At a minimum, the following should be involved in determining weatherization plan:
 - Executive Director,
 - Program Manager,
 - Chief Financial Officer
- Others stakeholders for consideration
 - Crew (Energy Auditor, QCI, Crew Leader, Installers)
 - Those responsible for reporting in OKGrants
 - ODOC
 - Contractors



APPLYING IN OKGRANTS

View Available Opportunities

You have **12** opportunities available.
Select the **View Opportunities** button below to see what is available to your organization.

[VIEW OPPORTUNITIES](#)



6. COMPLETE OKGRANTS FORMS

- Applicant Information
- Detailed Budget Line Item
- Management Plan
- Uploads
- Audit

Status	Page Name
Application	
	Applicant Information
	Detailed Line Item Budget
	Management Plan
	Uploads
	Audit

Reminder - Budget contains Production Schedule and will auto calculate ACPU



BUDGET

ACPU (Average Cost per Unit)

Program Support **PLUS (+)** Materials

DIVIDED (/) by # of homes

Total Program Support: A-G			
MATERIALS			\$0
INSURANCE (Liability and POI)			\$0
HEALTH & SAFETY			\$0
PROGRAM OUTREACH			\$0
ADMINISTRATION			\$0
Salaries and Wages			\$0
Fringe Benefits			\$0
Equipment			\$0
Other			\$0
TOTAL ADMINISTRATION			\$0
AUDIT			\$0
TRAINING AND TECHNICAL ASSISTANCE			\$0
TOTAL BUDGET			

COST CATEGORIES:	Present Budget	Bs
ON-SITE: Salaries & Wages		
Fringe Benefits		
A. Total On-Site		
LABOR: PAYROLL/Program Support		
Salaries and Wages		
Fringe Benefits		
B. Total Labor: Payroll		
C. Labor: Subcontracted		
TRANSPORTATION		
Local Mileage		
Vehicle Insurance		
Fuel/Maintenance Expense		
D. Total Transportation		
E. Total Tools, Equipment and Vehicle Purchases		
F. Storage		
OFFICE EXPENSES: PROGRAM SUPPORT		
Space (lease/rent)		
Utilities		
Telephone		
Other (program support expenses)		
G. Total Office Expenses: PS		
Total Program Support: A-G		

BUDGET

A: Total of Funds for Program Operations (Total Program Support plus Materials)

B: Total Units to be Weatherized, plus Planned Reweatherized Units from Production Schedule above (total from above)

C: Average Cost per Dwelling Unit (A divided by B)

If the amount in item C exceeds the current program year's allowable average cost per unit (see CAA Manual), you must request ODOC preapproval. New applications cannot be submitted with average cost per units higher than the allowable threshold.



MANAGEMENT PLAN

Total Of All Units Combined:

PART B: Performance Data

Weatherized Units by County and Month:

6. County Name	7. County Alloc. Amt	8. Allocation %	9. Total Units	April	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
<input type="text"/>	<input type="text"/>	%	<input type="text"/>									
<input type="text"/>	<input type="text"/>	%	<input type="text"/>									
<input type="text"/>	<input type="text"/>	%	<input type="text"/>									
<input type="text"/>	<input type="text"/>	%	<input type="text"/>									
<input type="text"/>	<input type="text"/>	%	<input type="text"/>									
<input type="text"/>	<input type="text"/>	%	<input type="text"/>									
<input type="text"/>	<input type="text"/>	%	<input type="text"/>									
<input type="text"/>	<input type="text"/>	%	<input type="text"/>									
<input type="text"/>	<input type="text"/>	%	<input type="text"/>									
<input type="text"/>	<input type="text"/>	%	<input type="text"/>									
<input type="text"/>	<input type="text"/>	%	<input type="text"/>									
<input type="text"/>	<input type="text"/>	%	<input type="text"/>									
<input type="text"/>	<input type="text"/>	%	<input type="text"/>									
<input type="text"/>	<input type="text"/>	%	<input type="text"/>									
<input type="text"/>	<input type="text"/>	%	<input type="text"/>									
<input type="text"/>	<input type="text"/>	%	<input type="text"/>									
<input type="text"/>	<input type="text"/>	%	<input type="text"/>									
<input type="text"/>	<input type="text"/>	%	<input type="text"/>									
<input type="text"/>	<input type="text"/>	%	<input type="text"/>									

11. Total Cumulative Total Units By Month:

13. Provide Justification for Revisions



COUNTY CHANGE

Starting with Program Year 2020, ODOC will no longer be awarding funds by county. Your agency may allocate Program funds by county based on need and available resources. Although it is not required to serve every county every year, every county must be served over a period of time (for example, every 2 or 3 years). Any counties your agency decides not to serve this program year must be listed in the Justification box along with the next year it is anticipated they will be served.

Cumulative total units by month.

Month	Units
Jan	
Feb	
Mar	
Apr	
May	
Jun	
Jul	
Aug	
Sep	
Oct	
Nov	
Dec	

13. Provide Justification for Revisions

0 of 5000

Upload Justification if needed No file chosen

****NEW****



7. COMPLETE ODOC FORMS

- **No forms required this year**



8. UPLOAD ALL REQUIRED DOCUMENTATION

The following documents must be uploaded in OKGrants:

1. Agency Quality Control Inspector Building Performance Institute Certification(s)
2. Energy Auditor Building Performance Institute Certification(s) (optional)
3. Waiting Lists
4. List of COVID -19 deferred homes (may be submitted separately or as part of waiting list)
5. MOUs with third party subcontractors (for any retrofit installer, crew leader, quality control inspector, or energy audit work that is subcontracted, whether in or out of network). This does not include HVAC, electrical, or plumbing contractors.



9. DOUBLE CHECK

- Always have a second or third set of eyes if possible.



10. SUBMIT APPLICATION

- Make sure to do so by due date
- The sooner the better

Initiation and submission of this application will begin the process for the preparation and execution of an ODOC contract, which will have the contract period of April 1, 2020 – March 31, 2021. **Application should be initiated and completed no later than June 12, 2020.**

