

U.S. Department of Energy

WEATHERIZATION ANNUAL FILE WORKSHEET

Identification: EE0000151

State: MO

Program year: 2009

Budget period: 04/01/2009 - 03/31/2012

II.3 Subgrantees

Grantee	City	Tentative	
		Funding	Units
01-Community Services, Incorporated of Northwest Mo.	Maryville	3,210,835.00	437
02-Delta Area Economic Opportunity Corporation	Portageville	4,661,912.00	696
03-East Missouri Action Agency	Park Hills	4,483,365.00	1,178
05-Economic Security Corporation of Southwest Mo.	Joplin	4,347,701.00	808
06-Green Hills Community Action Agency	Trenton	1,899,755.00	314
07-Central Missouri Community Action	Columbia	5,336,253.00	776
08-Urban League of Metropolitan St. Louis	St. Louis	10,786,411.00	1,502
09-Jefferson-Franklin Community Action Corporation	Hillsboro	3,405,756.00	624
10-Kansas City Housing & Community Development Department	Kansas City	13,360,231.00	1,950
11-Community Action Agency of St. Louis County	St. Louis	10,307,339.00	1,539
12-Missouri Ozarks Community Action, Inc.	Richland	4,566,098.00	637
13-Missouri Valley Community Action Agency	Marshall	3,451,498.00	487
14-North East Community Action Corporation	Bowling Green	5,465,420.00	787
15-Northeast Missouri Community Action Agency	Kirksville	883,377.00	147
16-Ozark Action, Inc.	West Plains	3,505,383.00	493
17-Ozarks Area Community Action Corporation	Springfield	10,384,527.00	1,877
18-South Central Missouri Community Action Agency	Winona	3,144,129.00	536
19-West Central Missouri Community Action Agency	Appleton City	3,963,750.00	613
30-Central Missouri Community Action	Columbia	1,500,000.00	230
31-City of Independence	Independence	635,683.00	100
32-City of O'Fallon	O'Fallon	350,000.00	64
33-City of St. Charles	St. Charles	350,000.00	48
34-Community Action Agency of St. Louis County	St. Louis	550,000.00	94
35-Community Action Partnership of Greater St. Joseph	St. Joseph	967,789.00	180
36-Delta Area Economic Opportunity Corporation	Portageville	300,000.00	56
37-Economic Security Corporation of Southwest Area	Joplin	991,710.00	293
38-Green Hills Community Action Agency	Trenton	291,651.00	40
39-Helping Ministry Neighborhood Development Corporation	Hayti Heights	600,000.00	92
40-Mid-America Regional Council	Kansas City	4,500,000.00	659
41-Missouri Ozarks Community Action-AECI	Richland	1,302,500.00	250
42-Missouri Ozarks Community Action, Inc - Lebanon	Richland	720,000.00	150
43-Missouri Valley Community Action Agency	Marshall	214,907.00	38
44-North East Community Action Corporation	Bowling Green	350,000.00	127
45-Ozark Action, Incorporated	West Plains	1,137,680.00	200
46-Ozarks Area Community Action Corporation	Springfield	2,275,144.00	646
47-Urban League of Metropolitan St. Louis-City	St. Louis	4,732,541.00	842
48-Urban League of Metropolitan St. Louis-County	St. Louis	2,100,000.00	299
49-West Central Missouri Community Action Agency	Appleton City	1,770,000.00	295
TOTALS		122,803,345.00	20,104

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SERC Subgrantees

Grantee	City	Tentative	
		Funding	Units
60-Central Missouri Community Action	Columbia	522,501.00	25
TOTALS		522,501.00	25

II.4 WAP Production Schedule

Total Units (excluding reweatherized)	19,883

Rewatherized Units	221

Planned SERC Units *	25

* Planned SERC units is the calculated total units for all SERC Subgrantees.

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Average Unit Costs, including Reweathering, Subject to DOE Program 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	19,883
C	Total Units Reweatherized	221
D	Total Dwelling Units to be Weatherized and Reweatherized (B+C)	20,104
E	Average Vehicles & Equipment Acquisition Cost per Unit (A divided by D)	\$0.00
AVERAGE COST PER DWELLING UNIT (DOE RULES)		
F	Total Funds for Program Operations	\$100,377,277.00
G	Total Dwelling Units to be Weatherized and Reweatherized (from line D)	20,104
H	Average Program Operations Costs per Unit (F divided by G)	\$4,992.90
I	Average Vehicles & Equipment Acquisition Cost per Unit (from line E)	\$0.00
J	Total Average Cost per Dwelling (H plus I)	\$4,992.90

SERC Average Unit Costs, including Reweathering, Subject to DOE Program Rules		
AVERAGE COST PER DWELLING UNIT (DOE RULES)		
A	Total Funds for Program Operations	\$454,851.00
B	Total Funds for Health and Safety	\$52,250.00
C	Total Funds for Program Operations and Health and Safety (A+B)	\$507,101.00
D	Total Dwelling Units to be Weatherized	25
E	Average Program Operations and Health and Safety Costs per Unit (C divided by D)	\$20,284.04

II.5 Energy Savings

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

The Missouri Department of Natural Resources Division of Energy (DNR/DE) estimates that, for the Missouri ARRA WAP Funds for Program Years 2009/2010/2011 funding, a total of 20,129 homes will be weatherized. For these homes it is estimated that 534,304 mmBtu/year of energy will be saved.

Method for calculating energy savings is as follows:

For determining the energy savings by fuel type, the DNR/DE used data from the Oak Ridge National Laboratories' report "Estimating the National effects of the US Department of Energy's Weatherization Assistance

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Program with State Level Data: A Metaevaluation Using Studies from 1993 to 2005" (ORNL/CON-493).

Average Energy Savings for gas heated homes 30.5 mmBtu/yr/home

Average energy savings for electric heated homes 6.6 mmBtu/yr/home

Average energy savings of electricity for non heating purposes 2.1 mmBtu/yr/home

Average energy savings for homes with combined gas heating and electric baseload savings. 32.6 mmBtu/yr/home

Data collected from MO Wx Agencies, Home Complete Summary PY 2008.

Percent of homes with electric savings only 22%

Percent of homes with gas savings only 16%

Percent of homes with both gas and electric savings 62%

.22 x 20,129 homes x 6.6 mmBtu/yr/home = 29,227 mmBtu/yr

.16 x 20,129 homes x 30.5 mmBtu/yr/home = 98,230 mmBtu/yr

.62 x 20,129 homes x 32.6 mmBtu/yr/home = 406,847 mmBtu/yr

Estimated PY 2009/2010/2011 savings 534,304 mmBtu/yr

Estimated energy savings: 534,304.00 (MBtu)

Estimated prior year savings: Actual:

If variance is large, explain:

II.6 Training, Technical Assistance, and Monitoring Activities

The state of Missouri will use Weatherization Assistance Program American Recovery and Reinvestment Act funds under the Energize Missouri Initiative. The goals of the Energize Missouri Low Income Weatherization Assistance Program are to provide effective management and leveraging of multiple sources of federal and other funding; continuation of improved weatherization services; increased energy efficient housing; long-term reduction in utility bills; economic revitalization; job creation; and comfort and safety of those served.

Section II.6 herein describes specific training and technical assistance activities. Section III.4 of the "On file" Information describes the overall approach and includes (1) Assessment of training needs for local weatherization agencies and (2) Productivity of agencies and development of T&TA activities.

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Local weatherization agencies and the Missouri Department of Natural Resources' Division of Energy (DNR/DE) had formed a past work group that assessed training needs and concluded that:

Training should be on-going

Training should be mandatory depending on job classification and certification requirements, voluntary in other instances

Training should include theory and hands-on approach

Training should be provided on a regional basis

Training should include a combination of training options

Training should include conferences and workshops

Training should include peer exchange

The DNR/DE encourages the network of local agency weatherization technicians to be trained in building science principals, building diagnostics, combustion heating systems, Energy-Related Mold and Moisture, and whole house best practices approach to cost effective energy efficiency measures. Technicians are required to demonstrate competency in knowledge and performance skills in these disciplines through the Building Performance Institute (BPI) testing and certification program.

Training providers are listed on the DNR/DE website with available training courses which focus on the following:

BPI Building Analyst

Building Science for Home Weatherization

Weatherization Training

Weatherization Inspector/Auditor Training

Auditing Mobile Homes

Combustion Systems

HVAC Service Technician

EPA Certified Renovator

Lead Safe Work Practice

OSHA 10DOE Energy-Related Mold and Moisture

The Manufactured Home Energy Audit (MHEA) and the National Energy Audit Tool (NEAT) are available as part of the Weatherization Assistant.

On or after April 22, 2010, agencies and contractors addressing activities that disturb lead-based paint in target homes and child occupied facilities must follow the Environmental Protection Agency's (EPA) Renovation, Repair, and Paint (RRP) Final Rules (Section 402 (c) (3) of TSCA. New crewmembers and contractors are required to be trained within a six-month period. However, they cannot work on a home(s) with lead paint until becoming a Certified Renovator or being trained on site by a Certified Renovator. Refresher training is required every 5 years.

Training activities will include efforts on certification for Missouri weatherization technicians. It is important to provide a mechanism by which technicians may be certified in accordance with the Building Performance Institute (BPI). BPI has established technical standards and testing protocols for trade professionals to ensure efficiency and durability of the buildings they work on and the comfort and safety of the people who live in them. BPI-certified technicians are required to demonstrate competency in the knowledge and performance skills necessary to inspect, diagnose and troubleshoot building performance issues.

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Beginning in program year 2005 each weatherization agency was required to have at least one BPI-certified auditor, Building Analyst I, on staff as part of a quality assurance program. Any subgrantees without the required trained and certified energy auditor must submit a corrective action plan to the DNR/DE before the DNR will award a subgrant for the subsequent program year.

Details regarding state program oversight and T&TA funding are contained in the standard federal 424 form: Federal Assistance Budget information Section A and B. Each subgrantee will be awarded a portion of T&TA funds based on the subgrantee's budgeted need and as approved by the DNR/DE. Local agency T&TA funds may only be used to pay for the cost associated with:

- Crew member and contractor related training courses
- BPI related training courses related to certification and re-certification
- Local and State LIWAP-related meetings and training conferences
- Regional and national LIWAP-related meetings and training conferences
- Training on computers and software related to LIWAP operations
- LIWAP training or assistance provided between local agency subgrantees.

Effectiveness of Training and Technical Assistance:

- DNR/DE plans to implement the use of surveys of training participants to rate course content, effectiveness of instruction and applicability to improved weatherization services
- NEAT/MHEA audit results and savings to investment ratio
- Cost and quality of home energy retrofit
- Housing quality monitoring inspections
- Implementation of best practices and work quality standards

MONITORING ACTIVITIES:

DNR/DE monitoring activities span four distinct but interrelated areas of program operations:

1. Housing quality inspections
2. Production and expenditure reviews
3. Fiscal and program operations
4. Oversight of federal/state requirements and regulations

Implementing the MDNR/DE monitoring system involves:

A. Desk Monitoring

A Subgrantee is required to submit monthly reports to the DNR/DE that include the client's names, job numbers and other required information. The DNR/DE is in the process of implementation of a web-based database to assist with reporting, tracking, data retention, etc. This web-based system will assist with client file review (procedural and

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technical). The reporting, budget preparation, etc. will be performed through the web-based system and will prepare the reimbursements to SAM II electronically. With this web-based system, DNR/DE can determine compliance with:

- The federally designated expenditure categories.
- Actual expenditures versus planned expenditures.
- Overall expenditure rates by each Subgrantee.
- Characteristics of completed homes.
- Numbers of completed units per month.
- Numbers of persons and households by WAP targets.

Reimbursement to a Subgrantee is based on clear, accurate reporting of expenditures and clients served. DNR/DE provides each Subgrantee with an analysis of the monthly report. This includes feedback concerning specific problems a Subgrantee may be experiencing in its operations or in its compliance with grant requirements. Information collected is also used to target selected items for monitoring during field visits to a Subgrantee.

B. Procedural Monitoring

DNR/DE will visit each Subgrantee at least once each program year to review procedural, fiscal and compliance issues. DNR/DE will conduct a thorough review of the procedures of the Subgrantee by using a standardized and extensive monitoring protocol.

A risk assessment has been performed for the subgrantee agencies. Based on this assessment, the DNR/DE and DNR Internal Audit program have determined the various levels of procedural monitoring based on risk. If a subgrantee agency is determined as low risk, a review of 5% of client files for the program year will be reviewed during the procedural monitoring, with a minimum of 5 files reviewed. If a subgrantee agency is determined as medium risk, a review of 9% of client files for the program year will be reviewed during the procedural monitoring, with a minimum of 10 files reviewed. If a subgrantee agency is determined as high risk, a review of 18% of client files for the program year will be reviewed during the procedural monitoring, with a minimum of 15 files reviewed.

DNR/DE will review Subgrantee compliance with federal/state regulations and requirements as specified in the Missouri WAP Annual and Master files, the Missouri WAP Competitive Procurement Standards, and the DNR General Terms and Conditions for Federal Subgrants.

Annual independent audits will be reviewed to ensure audit financial schedules match financial reports submitted during the year.

C. Housing Quality Monitoring

A variety of items are reviewed by DNR/DE housing quality monitors during on-site visits.

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1. DNR/DE will schedule an on-site visit(s) to a Subgrantee as necessary, but at least once per program year, to inspect the quality of work on the homes completed. A representative sample of completed homes will be inspected to determine whether or not the work reported and materials installed are in compliance with WAP standards.

DNR/DE has developed a risk assessment strategy which will be implemented in determining the number of homes to be inspected at each subgrantee agency. For agencies determined as low risk, a minimum of 5% of the total homes completed will be inspected. For agencies determined as medium risk, a minimum of 7.5% of the total homes completed will be inspected. For agencies determined as high risk, a minimum of 10% of the completed homes will be inspected.

DNR/DE will have the option to inspect additional houses when implementing new measures, or when other concerns arise. Inspection checklists are used to assist DNR/DE with on-site inspections. Additional information may be obtained or requested from the Subgrantee client files to document the findings of the monitoring visit. DNR/DE will inspect the following:

- Compliance with allowable WAP measures. - Quality of work.
- Accuracy of the report concerning the amount of material installed on the home.
- Assurance that the initial energy audit and final inspection are appropriate, accurate and complete.
- Crew and contractor compliance with OSHA 10 and LSW training requirements.
- Worksite for compliance with required health and safety equipment, personal protection gear, and reference materials.

2. DNR/DE may also perform follow-up reviews of homes where additional work or corrective measures were required as a result of a past DNR/DE inspection.

3. Selected materials will be inspected to insure they meet federal specifications.

4. Pre-audits may be done to determine accuracy.

D. Independent Monitoring

1. Independent Fiscal Audit Review

A Subgrantee is required to have an annual fiscal audit, in accordance with OMB Circular A-133. This audit shall document expenditures and compliance with regulations and requirements. The independent auditor shall use the schedules found in the WAP audit guide to present the required financial data. Findings are compared to the subgrant and monthly reports.

Client Education: Client education is an effective method of improving the impact of WAP measures. These efforts include fact sheets, brochures, the State DNR/DE WAP website, and one-on-one contact. Subgrantees play a vital role

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in expanding client education activities at the local level. Local activities include client workshops, providing Energy Saver booklets, client interviews and instruction when auditing and final inspecting the home, the explanation of information found in EPA's Renovate Right and Mold pamphlets, and local newspaper articles and radio and television spots.

DNR/DE recently added several new positions to the WAP. Four new staff members work on WAP administration, desk monitoring and on-site fiscal and procedural monitoring. Two new staff members were hired for technical monitoring and technical assistance. DNR/DE has also hired several new staff in the Fiscal Section that provide valuable assistance to the weatherization program. This includes assistance with Davis Bacon, payroll, fiscal and procedural monitoring, reporting, tracking and expenditures.

In addition, DNR/DE has utilized available contract monitoring services for additional fiscal and procedural monitoring and is currently soliciting a technical monitoring contractor through an RFP process. Approximately 25 percent of grantee T&TA funds are allocated for program oversight and monitoring.

II.7 DOE-Funded Leveraging Activities

Federal regulations allow weatherization funds to be used for leveraging activities. Under leveraging, subgrantees work at developing relationships with property owners, utility companies and other entities that generate non-federal resources for the program. Examples of some of the leveraging partnerships are donations from some local/national hardware and lumber stores, local realtors, etc. All Weatherization subgrantees participate in leveraging and partnership activities, although not all of them charge expenditures to the leveraging category for these activities. Non-federal resources are used to supplement the program and expand energy efficiency services and/or increase the number of dwelling units completed for weatherization eligible clients.

Subgrantee agencies are encouraged to budget an amount of funds the agency actually believes it will be able to use, not to exceed 5% of its grant allocation, for leveraging purposes. Subgrantee requests for leveraging must include specific planned leveraging activities; targeted partners (e.g., landlords, utilities, other agencies); and estimated outcomes including dollar amounts. If agencies do not initiate meaningful leveraging activities, the funds may be considered as state carryover, and may be redirected to other agencies.

In addition, through a competitive selection process that was completed March 31, 2010, the DNR/DE has funded twenty projects through the Energize Missouri Housing Initiative that accomplish the following kinds of WAP enhancements: attract additional sources of sustainable funding for the Weatherization Assistance Program; enhance and extend the impact of WAP investments with complementary activities and policies; attract non-federal funding and services to low-income families to complement services eligible under the WAP; establish and share best practices among subgrantee agencies; and aid in development of a ready WAP workforce. See II.10, Adjustments to On-File Information - Energize Missouri Housing Initiative of the Annual File and III.3.1, Type of Work to Be Done - Energize Missouri Housing Initiative of the Master File for additional information.

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II.8 Policy Advisory Council Members (names, groups, agencies)

Missouri Gas Energy	Ms. Pam Levetzow
Vacancy	
10-Kansas City Housing & Community Development Department	Mr. Robert Jackson, Weatherization Director
Office of Public Counsel	Mr. Ryan Kind
Lieutenant Governor's Office	Mr. Richard Aubuchon
Public Service Commission /	Vacant
Boone Electric Cooperative	Mr. Chris Rohlfing
16-Ozark Action, Inc.	Mr. Terry Sanders, Weatherization Director
05-Economic Security Corporation of Southwest Area	Mr. John Joines
17-Ozarks Area Community Action Corp	Mr. Todd Steinmann, Weatherization Director

II.9 State Plan Hearings (send notes, minutes, or transcript to the DOE office)

Hearing Date	Newspapers that publicized the hearings and the dates that the notice ran.
04/24/2009	Columbia Tribune (4/15/09) and Jefferson City News Tribune (4/19/09)
11/17/2010	Columbia Tribune (11/xx/10) and Jefferson City News Tribune (11/xx/10)
05/20/2010	DNR Press Release (5/10/2010) Jefferson City News Tribune (5/13/2010)

II.10 Adjustments to On-File Information

PY 2009 was the first year of the new three-year WAP American Recovery and Reinvestment Act (ARRA) grant from the US DOE to the Missouri Department of Natural Resources Division of Energy (DNR/DE). The project period is for a three-year period, beginning April 1, 2009 and ending March 31, 2012. The State of Missouri has designated the ARRA funds as the Energize Missouri Initiative.

The DNR/DE plans to utilize the \$6,500 average cost per home, including any inflationary adjustments.

The tentative allocations and number of homes are based on new funding distributed to subgrantees.

Subgrantees will not be permitted to use regular DOE funds with Energize Missouri funds on the same homes.

All contract laborers working on Energize Missouri Initiative funded projects will be paid Federal prevailing wages for that locality and the type of work that will be performed.

The DNR/DE will comply with all reporting requirements that are established as of the date of this amended application.

Energize Missouri Performance Based Incentive - Twenty percent (20%) of the Energize Missouri WAP funding will be used by the DNR/DE as an incentive for superior subgrantee performance. In July, 2010, the DNR/DE evaluated each subgrantee's performance against defined benchmarks. For subgrantees that met or exceed the established criteria, incentive funds will be distributed according to population/poverty criteria and waiting lists. The DNR/DE expects to distribute these funds on or before September 15, 2010. (See section III.3.4, Assessment of Effectiveness,

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of the Master File for more detailed information.)

Energize Missouri Housing Initiative - Twenty percent (20%) of the Energize Missouri WAP funding will be used by the DNR/DE for initiatives that result in increased benefit and greater positive impact for clients, neighborhoods and communities served. These funds will be focused on initiatives that provide energy-efficiency services to clients and significantly leverage other sources of funding for greater client benefit and job creation. For example, these initiatives may focus on larger, multi-family housing units or neighborhood-based programs. These funds also could focus on initiatives that increase services to underserved low-income populations, bring non-traditional partners together to deliver leveraged and high-value services to low-income populations, or propose ways to deliver services more efficiently and effectively to dispersed rural populations. The DNR/DE will follow U.S. Department of Energy guidance in the selection of subgrantees for the use of these funds (10 CFR440.15). All selected subgrantees will be required to follow standard technical quality, reporting and administrative requirements established by federal rule and state/DNR/DE policies and procedures. These funds were distributed on a competitive basis through a request for proposals. The DNR/DE is cognizant of the importance of using the priority system that focuses on elderly, families with children, persons with disabilities, and the desirability of geographic distribution when making decisions about the use of these funds. The DNR/DE released the Energize Missouri Housing Initiative Request for Proposals (RFP) on February 23, 2010. Project proposals were due and received on March 31, 2010. A public hearing was held on May 20, 2010 to amend the state plan and finalize awards. DNR/DE distributed funds to twenty projects as listed in Section II.3 of this revised state plan.

II.11 Miscellaneous

See attachment.

SERC Miscellaneous

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Type of work: Central Missouri Community Action's SERC proposal includes a collaborative weatherization project with its local electric cooperatives to install geothermal heating systems in 25 households that have also been weatherized using other agency funding sources. CMCA will implement this project in each of the eight counties that it currently serves through the Low-Income Weatherization Assistance Program. The overall goal of the proposed project is to install geothermal technology to achieve greater energy savings. CMCA will target rural populations receiving weatherization services according to DNR/DOE LIWAP guidelines.

SERC Monitoring of projects: All monitoring expenditures will be charged to the ARRA T&TA, none will be reimbursed from the SERC grant. The SERC subgrant will be monitored in the same manner as the regular funding. See Section II.6 Training, Technical Assistance and Monitoring Activities.

SERC Training & Technical Assistance (T&TA): All T&TA activities will be reimbursed from the ARRA T&TA, none will be reimbursed from the SERC grant.

SERC Evaluation and Energy Savings: Energy efficiency achievement will be identified as the reduction in the air changes per hour, which will be measured by a blower door performed at the initial audit and again at the final inspection of the homes completed. CMCA will also track energy savings achieved through the installation of donated items received from Associated Electric. Twenty-five homes receiving geothermal heating systems will be examined through NEAT/MHEA to determine estimated savings gained through geothermal heating systems.

Moderate-income eligibility: All household income levels will be consistent with LIWAP guidelines at 200% of the federal poverty rate.

Geographic areas to be served: CMCA's project will target rural areas in the eight counties served by CMCA. This includes: Audrain, Boone, Callaway, Cole, Cooper, Howard, Moniteau and Osage.

Client education: CMCA plans to utilize energy conservation educational materials created by MU Extension staff to provide to all clients served under this proposal, and in future weatherization efforts.

Energy-Related Health & Safety Costs: Ten percent (10%) of the SERC grant value will be available for the CMCA to utilize for installation of energy-related health and safety measures. The cost for any one unit shall not exceed the costs for the installation of the SERC material or technology. The DNR/DE is utilizing the MoWAP system for tracking of health and safety costs. All homes reported through the MoWAP system will be reviewed to ensure that health and safety costs are within the approved budget.