

Fund Matrix
Revised April 2010

2010 DOE and DOE ARRA Average Cost Per Unit = \$6500

The adjusted average expenditure limit per home for all funds appropriated and/or used for PY 2009 is now \$6500. The Recovery Act did not specifically address the renewable energy measures average cost per home. DOE programs are the only Wx funding sources with an average cost per unit.

FAM = Pre-approved measure
Approval first measure
Not permissible

Categories included in DOE Average Cost and SIR: Energy Efficiency Measures and Weatherization-Related Repairs.

Categories **NOT** included in DOE Average Cost and SIR: Health & Safety Measures, Administration, Training and Technical Assistance, and Low-Cost/No-Cost.

For PSE and PUD, see Special Terms and Conditions for each program.

Avista's Response: Allowable Expense?	Avista's Response: Cost in TRC?	Activities/Measures	Fund Source	Allowable Expense?	Specifics/Limitations/Allowances	Cost included in SIR? (Individual measure & total package)
Air infiltration work is an approved measure.	The full cost of infiltration measures is considered a TRC expense.	Air Sealing Section 5.3.3	DOE HHS BPA EM	Yes Yes Yes Yes	Electric heat and BPA service territory only	Yes Yes Yes Yes
Energy Star refrigerators, efficiency clothes washers and microwaves are all allowable upon approval. We have only received requests for refrigerators	For refrigerators and clothes washers, the full utility-funded cost of the efficient measure is included as a TRC cost and the cost of the base case alternative is considered to be a TRC non-energy benefit. The full cost of a microwave would be a TRC cost without any offsetting non-energy benefit (since we assume that the home already had an oven).	Appliances	DOE HHS BPA EM	No No Yes No	Refrigerator Replacement (see below), Clothes Washer Replacement, and Microwave Ovens New or Replacement. May include non-electrically heated, low-income homes in BPA service territory.	To be determined
CFLs are an approved measure.	The incremental cost of the CFL above the incandescent lamp cost would be considered a TRC expense.	CFLs & Fixtures Section 5.2	DOE HHS BPA EM	Yes Yes Yes Yes	Labor, hardware/CFL bulb replacement a low-cost measure, does not require cost justification/fixtures & CFL bulbs. Same as DOE Same as DOE May include non-electrically heated, low-income homes in BPA service territory. Same as DOE	Yes, if fixtures or CFL torchiere lamps Yes, if fixtures or CFL torchiere lamps Yes, if fixtures or CFL torchiere lamps Yes, if fixtures or CFL torchiere lamps

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Conservation education is funded and implemented through the LIRAP program.	Conservation education is a LIRAP program and thus the costs are not part of the DSM low-income portfolio. At the same time, we also don't incorporate any behavioral savings that might be attributable to that program to the DSM portfolio either. There are DSM-funded CFL's distributed in a manner closely tied to the LIRAP conservation education program that are treated in a manner consistent with the CFL measure noted above.	Consumer Conservation Education	DOE	Yes	Reimbursement limit: subject to average cost per unit (except LCNC) Allowable expenses: labor, materials, and program support (LCNC = materials only) Budget categories to charge: Program Operations or Admin (LCNC = Program Operations only) See Low-Cost/No-Cost notes for DOE specific information	No
			HHS	Yes	Reimbursement limit: up to 5% of grant. Allowable expenses: labor, materials, program support, LCNC Budget categories to charge: Program Operations or Admin	No
			BPA	Yes	Reimbursement limit: up to 20% of grant Allowable expenses: labor, materials, program support, LCNC Budget category to charge: Client Education Visits can be done at non-electrically heated, low-income homes in BPA service territory.	No
			EM	Yes	Reimbursement limit: up to 5% of grant. Allowable expenses: labor, materials, program support, LCNC	No
Wall insulation is an approved measure.	The full cost of the wall insulation is a TRC expense.	Closed Wall Cavity Insulation Section 5.1.9	DOE	Yes		Yes
			HHS	Yes		Yes
			BPA	Yes	Electric heat and BPA service territory only	Yes
			EM	Yes		Yes
This is an allowable health & human safety measure, as long as it's within the 15% limit of a CAP's funding contract or can be part of a gas appliance energy efficiency measure.	The full utility-funded cost is considered to be a TRC expense to the portfolio, even though no savings are achieved, because the measure supports the safe habitability of the home (and therefore the longevity of the installed efficiency measures). A non-energy benefit of the same dollar amount is also added to the TRC calculation.	CO Detector Installation Section 5.3.2	DOE	Yes	Detector purchase and labor allowable/H & S expense	No
			HHS	Yes	Detector purchase and labor allowable/H & S expense	No
			BPA	Yes	Same as DOE. Electric heat and BPA service territory only	No
			EM	Yes	Detector purchase and labor allowable/H & S expense	No
This is an allowable health & human safety measure, as long as it's within the 15% limit of a CAP's funding contract.	The full utility-funded cost is considered to be a TRC expense to the portfolio, even though no savings are achieved, because the measure supports the safe habitability of the home (and therefore the longevity of the installed efficiency measures). A non-energy benefit of the same dollar amount is also added to the TRC calculation.	CO Testing Section 5.3.1	DOE	Yes	Testing devices and labor allowable/H & S expense	No
			HHS	Yes	Testing devices and labor allowable/H & S expense	No
			BPA	Yes	Testing devices and labor allowable/H & S expense	No
			EM	Yes	Electric heat and BPA service territory only	No
Avistia electric to any utility natural gas is an approved measure for space and water heat end-uses.	The full utility-funded cost of the measure is considered a TRC cost. The cost of the base case electric alternative would be considered to be a TRC benefit.	Fuel Switching Section 5.1.7	DOE	Yes	Testing devices and labor allowable/H & S expense Commerce does not permit the general practice of fuel switching. Local agencies must notify Commerce. Fuel switching may occur, on a case-by case basis, under the following conditions only: SIR of 1 or greater and Health & Safety. See Section 5.1.7. Fuel Switching, for policy specifics.	No
			HHS	Yes		Yes, unless H&S
			BPA	No		Yes, unless H&S
			EM	Yes		NA
				Yes		Yes, unless H&S

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A CAP agency may spend up to 15% of their funding on health & human safety measures. Only homes receiving an energy efficiency measure are eligible.	The full cost of health & human safety measures are included as a TRC expense. A non-energy benefit of the same amount is also included in the TRC calculation.	Health & Safety Measures & Repairs ** Must be energy-related Section 5.3	DOE HHS BPA EM	Yes Yes Yes Yes	Up to 25 % of program budget allowed. Up to 25 % of program budget allowed. Up to 30 % of program budget allowed. Electric heat and BPA service territory only. To be determined.	No No No No
Installation of efficient heating system is an eligible measure but does require prior approval.	The full utility-funded cost of the measure is considered to be a TRC cost. At the same time, the cost of the base case alternative is considered to be a non-energy benefit.	Heating System Replacement Section 5.1.2	DOE HHS BPA	Yes Yes Yes	Repair or replacement of electrical heaters or furnaces, if they are no longer working, or fail to heat the dwelling property, is an authorized expenditure. The repair or replacement of electric heaters or furnaces in Eligible Dwelling Unit must be accompanied by additional cost-effective major weatherization measures to assure maximum energy efficiency of the electricity used by the repaired or replaced heaters or furnaces. Local Service Providers must use all available matching funds for these repairs when such funds are available. Electric heat and BPA service territory only.	Yes, unless H&S Yes, unless H&S Yes, unless H&S
The cost associated with traditional CAP-performed energy audits is considered to be part of the 15% administrative cost reimbursed by the utility	The audit cost is captured within the administrative cost of the program and is thus treated as a non-incentive "utility" cost (with the CAP acting on behalf of the utility).	Home Energy Audits Section 5.1	EM DOE HHS BPA EM	Yes Yes Yes Yes Yes		Yes, unless H&S No No No No
Lead abatement could be a permissible health & human safety measure (supporting the continued safe habitability of the home and therefore the meaningful persistence of the installed efficiency measures). It has not been requested since there are dedicated state funds for lead abatement.	The full utility-funded cost of the measure would be considered to be a TRC cost.	Lead-Safe Weatherization Chapter 9	DOE HHS BPA EM	Yes Yes Yes Yes	LSW costs are an allowed Health and Safety expense. Allowed costs include labor, material, equipment purchases used specifically for testing for lead, & related costs. If HUD funds used or work done in HUD housing, DOE funds may be used for clearance testing if no HUD funds are available. LSW costs are an allowed Health and Safety expense. Allowed costs include labor, material, equipment purchases used specifically for testing for lead & related costs. LSW costs are an allowed Health and Safety expense. Allowed costs include labor, material, equipment purchases used specifically for testing for lead, & related costs. Electric heat and BPA service territory. Allowed costs include labor, material, equipment purchases used specifically for testing for lead, & related costs.	No No No No

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CAPs are permitted and encouraged to perform low-cost/no-cost improvements as appropriate. If they seek compensation for the measure cost as an identifiable measure, it would need to either be on the "approved" measure list or they would need to contact the utility prior to installation. Costs included as part of the 15% administrative cost do not require pre-approval.	Any cost associated with an identified installed measure would be identified as a TRC cost. CAP agency work that is outside the scope of an identifiable measure is compensated through the 15% administrative cost of the program and thus captured as a non-incentive "utility" cost for purposes of the TRC test.	Low-Cost/ No-Cost	DOE	Yes	Reimbursement limit: max of \$50 per dwelling unit Allowable expenses: materials only Budget category to charge to: Program Operations LCNC Wx measures are excluded from the average cost per unit expenditure. LCNC Wx measures are excluded from the "one DOE weatherization activity per dwelling unit restriction".	No
			HHS	Yes		No
			BPA	Yes		No
			EM	Yes		No
		Mechanical	DOE	Yes		Yes
	The full utility-funded cost would be included as a TRC cost.	Ventilation	HHS	Yes		Yes
			BPA	Yes	Electric heat and BPA service territory only	Yes
			EM	Yes		Yes
		Refrigerator Replacement Section 5.1.6	DOE	Yes	Costs associated with CFC disposal are required	Yes
	The full utility-funded cost would be included as a TRC cost. The cost of the standard efficiency base case would be considered as a non-energy benefit within the TRC test.		HHS	Yes	Costs associated with CFC disposal are required	Yes
			BPA	Yes	Costs associated with CFC disposal are required May be installed in non-electrically heated, low-income homes in BPA service territory.	Yes
			EM	Yes	Costs associated with CFC disposal are required	Yes
		Renewable Energy Systems Section 5.7	DOE	Yes	Funds for renewable energy systems are not in addition to current average cost per unit. Maximum amount is the cumulative total average expenditure allowed for labor, materials, & related costs per unit -- Wx measures & renewable energy systems combined. Maximum allowable = \$6500 (DOE regular) The Recovery Act did not specifically address the renewable energy measures average cost per home.	Yes
	The full utility-funded cost of the installation would be considered a TRC cost.		HHS	To Be Determined		
			BPA	To Be Determined		
			EM	To Be Determined		
Renewable measures require pre-approval prior to installation. (It seems unlikely that these would pass the cost-effectiveness test required for installation).						

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Insulation is an approved measure.		Re-Weatherization Section 1.6	DOE HHS BPA EM	Yes Yes Yes Yes	Can re-weatherize if the dwelling unit was weatherized prior to 9/30/1994. Additional restrictions apply. See Section 1.6, <i>Ineligible Residences and Exceptions</i> . Taking into account any previous energy conservation improvements, funds may be used to provide additional cost-effective weatherization regardless of when a home was previously weatherized or other fund sources used. Taking into account any previous energy conservation improvements, funds may be used to provide additional cost-effective weatherization regardless of when a home was previously weatherized or other fund sources used. Electric heat and BPA service territory only. Taking into account any previous energy conservation improvements, funds may be used to provide additional cost-effective weatherization regardless of when a home was previously weatherized or other fund sources used.	Depends on measure Depends on measure Depends on measure Depends on measure
This is an allowable health & human safety expense.	The full utility-funded cost of the measure would be included as a TRC cost. The same cost (not to include administrative cost) would be incorporated into the TRC test as a non-energy benefit.	Smoke Detector Section 5.1.4	DOE HHS BPA EM	Yes Yes Yes Yes	Detector purchase and labor allowed/Materials expense Detector purchase and labor allowed/Materials expense Electric heat and BPA service territory only Detector purchase and labor allowed/Materials expense	No No No No
This is an ineligible measure. Avista only funds electric-efficiency measure (for Avista electric customers) or natural gas efficiency measures (for Avista natural gas customers).	As an ineligible measure, there would be no TRC cost or benefit.	Solid Fuel Burning Appliance Systems Section 5.1.3	DOE HHS BPA EM	Yes Yes No Yes	Allowed as a H & S expense Allowed as a H & S expense Allowed as a H & S expense	No No No No
This measure would require prior utility approval.	The full utility-funded cost would be considered a TRC cost.	Space Heater Repair and Replacement Section 5.1.4	DOE HHS BPA EM	Yes Yes Yes Yes	Purchase & install smoke detectors allowable (program cost) Securing building permits allowable (program cost) Incidental repairs allowed on electric space heaters only Same as DOE Same as DOE/Electric heat and BPA service territory only Same as DOE	Yes, unless H&S Yes, unless H&S Yes, unless H&S Yes, unless H&S

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This measure would require prior utility approval for natural gas. Electric water heater replacement is an approved measure.	The full utility-funded cost would be considered a TRC cost.	Water Heater Repair & Replacement Section 5.1.5	DOE HHS BPA EM	Yes Yes Yes Yes	Electric heat and BPA service territory only	Yes, unless H&S Yes, unless H&S Yes, unless H&S Yes, unless H&S
If it has energy savings, it would require prior utility approval, typically it is health and human safety.	The full utility-funded cost would be considered a TRC cost.	Weatherization-Related Repair Section 5.4	DOE HHS BPA	Yes Yes Yes	Up to 15% of program budget allowed. Up to 15% of program budget allowed. Up to 30% of program budget allowed.	Yes Yes Yes
Only 'compromised' windows are eligible for funding. Replacing compromised windows is an approved measure.	The full utility-funded cost would be considered a TRC cost.	Window Repair & Replacement/Doors Section 5.1.1	EM DOE HHS BPA EM	Yes Yes Yes Yes Yes	Electric heat and BPA service territory only To be determined. See Section 5.1.1, Restrictions on Window & Door Repair & Replacement for One & Two Story Buildings, for repair and replacement justification. See Section 5.1.1 for repair & replacement justification. See Section 5.1.1 for repair & replacement justification. See Section 5.1.1 for repair & replacement justification	Yes Yes, unless H&S Yes, unless H&S Yes, unless H&S Yes, unless H&S

Definitions

**** Health & Safety Measures & Repairs:** Energy-related measures & repairs necessary to eliminate hazards within a structure, which by their remedy, allow for the installation of weatherization materials. Energy-related health and safety measures and repairs are intended to protect building occupants.

Weatherization-Related Repairs: Repairs necessary for the effective performance or preservation of weatherization materials.

DOE: DOE ARRA or DOE Regular funding

EM: Matchmakers funding