

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.

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.

Note: All allowable expenses are contingent on current policies. Please see Chapter 5, Providing Weatherization Services.

Activities/ Measures	Fund Source	Allowable Expense?	Specifics/Limitations/Allowances	Cost included in SIR? (Individual measure & total package)
Air Sealing Section 5.3.3	DOE	Yes		Yes
	HHS	Yes		Yes
	BPA	Yes	Electric heat and BPA service territory only	Yes
	EM	Yes		Yes
Appliances	DOE	No		
	HHS	No		
	BPA	Yes	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
	EM	No		
CFLs & Fixtures Section 5.2	DOE	Yes	Labor, hardware/CFL bulb replacement a low-cost measure, does not require cost justification/Fixtures & CFL torchiere lamps for energy efficiency allowable. No max limit on CFL bulbs.	Yes, if fixtures or CFL torchiere lamps
	HHS	Yes	Same as DOE	Yes, if fixtures or CFL torchiere lamps
	BPA	Yes	Same as DOE May include non-electrically heated, low-income homes in BPA service territory.	Yes, if fixtures or CFL torchiere lamps
	EM	Yes	Same as DOE	Yes, if fixtures or CFL torchiere lamps

Activities/Measures	Fund Source	Allowable Expense?	Specifics/Limitations/Allowances	Cost included in SIR? (Individual measure & total package)
Consumer Conservation Education	DOE	Yes	Reimbursement limit: subject to average cost per unit (except LCNC)	No
			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	
	HHS	Yes	Reimbursement limit: up to 5% of grant.	No
			Allowable expenses: labor, materials, program support, LCNC	
			Budget categories to charge: Program Operations or Admin	
	BPA	Yes	Reimbursement limit: up to 20% of grant	No
			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.	
	EM	Yes	Reimbursement limit: up to 5% of grant.	No
Allowable expenses: labor, materials, program support, LCNC				
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
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
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 Electric heat and BPA service territory only	No
	EM	Yes	Testing devices and labor allowable/H & S expense	No
Fuel Switching Section 5.1.7	DOE	Yes	Commerce does <u>not</u> permit the general practice of fuel switching. Local agencies must notify Commerce. Fuel switching	Yes, unless H&S
	HHS	Yes	may occur, on a case-by case basis, under the following	Yes, unless H&S
	BPA	No	conditions only: SIR of 1 or greater and Health & Safety. See	NA
	EM	Yes	Section 5.1.7, <i>Fuel Switching</i> , for policy specifics.	Yes, unless H&S

Activities/ Measures	Fund Source	Allowable Expense?	Specifics/Limitations/Allowances	Cost included in SIR? (Individual measure & total package)
Health & Safety Measures & Repairs ** Must be energy-related Section 5.3	DOE	Yes	Up to 25 % of program budget allowed.	No
	HHS	Yes	Up to 25 % of program budget allowed.	No
	BPA	Yes	Up to 30 % of program budget allowed. Electric heat and BPA service territory only.	No
	EM	Yes	To be determined.	No
Heating System Replacement Section 5.1.2	DOE	Yes		Yes, unless H&S
	HHS	Yes		Yes, unless H&S
	BPA	Yes	Repair or replacement of electrical heaters or furnaces, if they are no longer working, or fail to heat the dwelling properly, 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
	EM	Yes		Yes, unless H&S
Home Energy Audits Section 5.1	DOE	Yes		No
	HHS	Yes		No
	BPA	Yes	Electric heat and BPA service territory only	No
	EM	Yes		No
Lead-Safe Weatherization Chapter 9	DOE	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.	No
	HHS	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.	No
	BPA	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. Electric heat and BPA service territory.	No
	EM	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.	No

Fund Matrix

Activities/ Measures	Fund Source	Allowable Expense?	Specifics/Limitations/Allowances	Cost included in SIR? (Individual measure & total package)
Low-Cost/ No-Cost	DOE	Yes	Reimbursement limit: max of \$50 per dwelling unit	No
			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".	
HHS	Yes		No	
BPA	Yes		No	
EM	Yes		No	
Mechanical Ventilation	DOE	Yes		Yes
	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
	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.	
	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
	HHS	To Be Determined		
	BPA	To Be Determined		
	EM	To Be Determined		

Activities/ Measures	Fund Source	Allowable Expense?	Specifics/Limitations/Allowances	Cost included in SIR? (Individual measure & total package)
Re-Weatherization Section 1.6	DOE	Yes	Can re-weatherize if the dwelling unit was weatherized prior to 9/30/1994. Additional restrictions apply. <i>See Section 1.6, Ineligible Residences and Exceptions.</i>	Depends on measure
	HHS	Yes	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
	BPA	Yes	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.	Depends on measure
	EM	Yes	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
Smoke Detector Section 5.1.4	DOE	Yes	Detector purchase and labor allowed/Materials expense	No
	HHS	Yes	Detector purchase and labor allowed/Materials expense	No
	BPA	Yes	Detector purchase and labor allowed/Materials expense Electric heat and BPA service territory only	No
	EM	Yes	Detector purchase and labor allowed/Materials expense	No
Solid Fuel Burning Appliance Systems Section 5.1.3	DOE	Yes	Allowed as a H & S expense	No
	HHS	Yes	Allowed as a H & S expense	No
	BPA	No		
	EM	Yes	Allowed as a H & S expense	No
Space Heater Repair and Replacement Section 5.1.4	DOE	Yes	Purchase & install smoke detectors allowable (program cost) Securing building permits allowable (program cost) Incidental repairs allowed on electric space heaters only	Yes, unless H&S
	HHS	Yes	Same as DOE	Yes, unless H&S
	BPA	Yes	Same as DOE/Electric heat and BPA service territory only	Yes, unless H&S
	EM	Yes	Same as DOE	Yes, unless H&S

Activities/ Measures	Fund Source	Allowable Expense?	Specifics/Limitations/Allowances	Cost included in SIR? (Individual measure & total package)
Water Heater Repair & Replacement Section 5.1.5	DOE	Yes		Yes, unless H&S
	HHS	Yes		Yes, unless H&S
	BPA	Yes	Electric heat and BPA service territory only	Yes, unless H&S
	EM	Yes		Yes, unless H&S
Weatherization-Related Repair Section 5.4	DOE	Yes	Up to 15% of program budget allowed.	Yes
	HHS	Yes	Up to 15% of program budget allowed.	Yes
	BPA	Yes	Up to 30% of program budget allowed. Electric heat and BPA service territory only	Yes
	EM	Yes	To be determined.	Yes
Window Repair & Replacement/ Doors Section 5.1.1	DOE	Yes	See Section 5.1.1, <i>Restrictions on Window & Door Repair & Replacement for One & Two Story Buildings</i> , for repair and replacement justification.	Yes, unless H&S
	HHS	Yes	See Section 5.1.1 for repair & replacement justification	Yes, unless H&S
	BPA	Yes	See Section 5.1.1/Electric heat and BPA service territory only	Yes, unless H&S
	EM	Yes	See Section 5.1.1 for repair & replacement justification	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