



Department of Environmental Quality

Leveraging NC Weatherization with Other Resources



Leveraging NC Weatherization - Other Resources

Leveraging NC Weatherization Funds

Leveraged Resources for the NC Weatherization Assistance Program means benefit the program to increase the energy efficiency of dwellings owned or occupied by low-income persons, reduce their total residential energy expenditures, and improve their health and safety.

We are grateful for our Weatherization partners here today that help us serve the NC low-income community. These leveraged funds help minimize client deferrals, allowing multiple resources to assist clients with various housing repair issues.



Piedmont Triad Regional Council

Specialized local government with 74 member governments in 12 counties in the Piedmont Triad region. Administers federal, state and local funded grants and projects for our member governments. Offers programming in:

- Area Agency on Agency
- Administrative Services
- Criminal Justice
- Housing Rehabilitation Service
- Housing Choice Voucher Program
- Planning and Water Resources
- Weatherization Assistance Program
- Workforce Development



Duke Energy – Progress – Piedmont Natural Gas Programs

- DEC Weatherization Assistance – Rebate Program:
 - Up to \$4,000 towards Weatherization measures
 - Up to \$6,000 towards HVAC (electric only) replacement costs
- DEP Helping Hands Funds – Reimbursement Program:
 - \$3,000 for health and safety measures
 - \$2,000 for appliances
 - Up to \$4,000 towards HVAC (gas & electric) replacement costs

Essential Single Family Rehabilitation Loan Program

- Forgivable loan program of \$25,000 to \$30,000 depending on funding year:
 - Loan is forgiven at a rate of \$3,000/year
 - Focus is on bringing house up to code
 - Roofs, electrical, HVAC, plumbing and access issues

Urgent Repair Program

- Urgent repairs up to \$9,000
- Focus on roof leaks, electric issues and access issues

Leveraging Resources

HUD Community Development Block Grants

HOME Investment Partnerships Program

- Funding is provided to municipalities
- Offers both deferred and repay loans
- Can be used to supplement an eSFR job

Leveraging Resources

Conclusion

- Leveraging resource opportunities are everywhere our service populace
- Here are the members of the panel:
 - **Lorrie Maggio, Duke Energy**
 - **Sophie McMillian & Joel Groce, Blue Cross Blue Shield**
 - **Robert Vic, Piedmont Natural Gas**
 - **Mike Handley, NC Housing Finance Agency**
 - **Cynthia Hughes & Paula Thrush, US Department of Agriculture**

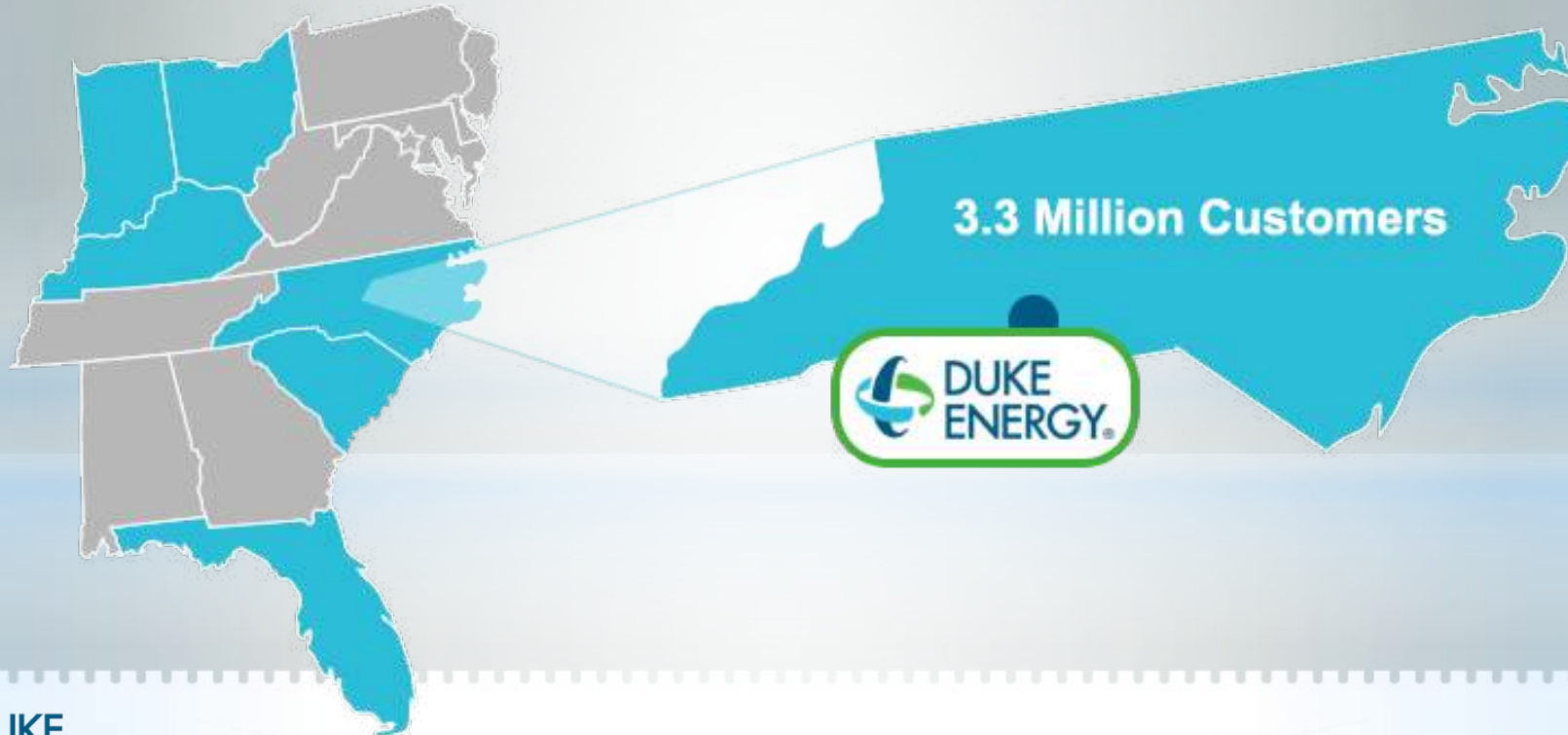


**HELPING HOME FUND
and
Income-Qualified Weatherization
PROGRAMS**

Lorrie Maggio & Joel Groce

Duke Energy

- Duke Energy Corporation is headquartered in Charlotte, NC
- Serve ~7.5 million retail electric customers in six states - NC, SC, FL, IN, OH and KY - representing a population of ~24 million people
- Serve ~3.3 million retail electric customers in NC



Duke Energy Carolinas Weatherization Program

Incentives provided for the following measures

- Refrigerator Replacements - Avg.~ \$900
- Tier I - Max \$600.00
 - Air Sealing
 - Door Weatherstripping
 - EE Bulbs
 - Water Saving Showerheads/faucet aerators
 - Electric Water heater wrap, pipe wrap
 - Electric heating system tune up and/or repair
- Tier II (All Tier I measures plus) - Max \$4,000 except with HVAC Replacement Max \$6,000
 - Attic Insulation
 - Wall Insulation
 - Floor/Belly Insulation
 - Duct Insulation
 - Electric HVAC replacement



Weatherization Pilot Program - Buncombe County Duke Energy Progress

Incentives provided for the following measures - Max \$1600 if all measures installed at maximum levels

- Attic Insulation - Max \$207.13
- Air Sealing - Max \$152.98
- Wall Insulation - Max \$241.23
- Floor Insulation - Max \$85.29
- Foundation Insulation - Max \$293.36
- Water Saving Shower Heads/Faucet Aerators - \$12.12 / \$10.65 ea.
- LED Light Bulbs - Max \$5.98 ea.
- Refrigerator Replacement - \$216 ea.
- Electric Water Heater Wrap / Pipe Insulation - \$20.66 / \$12.36 ea.
- Electric Water Heater Replacement - Max \$21.09

Duke Energy Progress' Helping Home Fund



Health & Safety

\$3000 maximum per home

**individual measures
capped at \$1000*

Appliance Replacement

\$2000 maximum per home

**individual appliances
capped at \$1000*



HVAC Services

\$4000 maximum per home

Health & Safety - Up to \$3000

- Attic & Crawl Access/Ladder/Dam Repair
- Bathroom Vent Installation/Repair
- Carbon Monoxide Remediation
- Carbon Monoxide/Smoke Detector Installation
- Chimney/Flue Repair
- Debris Removal
- Door Repair/Replacement
- Dryer Vent Installation/Repair
- Electrical Repair
- Floor Repair
- Gas/Electric Range Repair/Replace
- Grab Bar Installation
- Lead Safe Practices
- Mechanical Ventilation
- Mold/Mildew Remediation
- Pest Remediation
- Plumbing Repair
- Pressure Relief Valve Installation
- Roof Repair
- Safe Ingress and Egress
- Sewage/Septic & Sump Pump
- Vapor Barrier
- Wall/Ceiling Repair
- Water Damage Remediation
- Water Heater Repair/Replacement
- Window Repair/Replacement

Appliance Replacement - up to \$2000

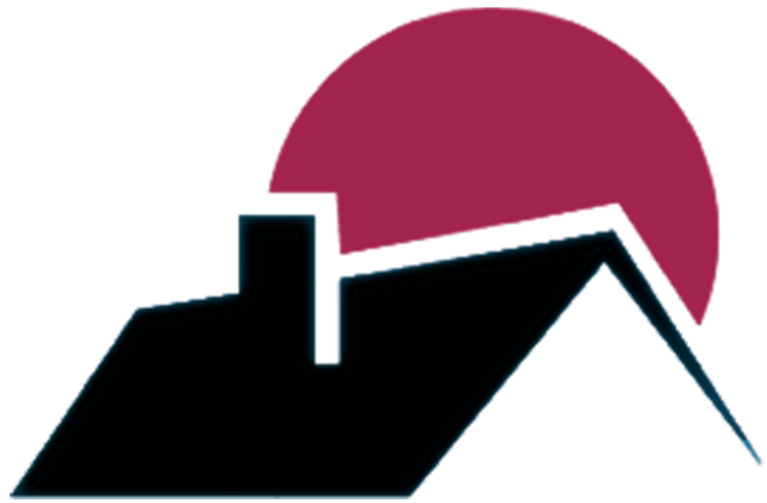
- Inefficient appliances must be replaced with ENERGY STAR® certified appliances in qualifying customer's homes.
- Appliances must be inoperable or greater than 10 years old.
- All old appliances must be recycled.
 - Refrigerators
 - Clothes Washers
 - Clothes Dryers
 - Room Air Conditioners
 - Dehumidifiers

HVAC Services - up to \$4000 per home

| | |
|--|---|
| Evaluate, Clean and Tune and/or Repair | <ul style="list-style-type: none">• Capped at \$1,000• Centrally ducted units qualify |
| HVAC Replacement | <ul style="list-style-type: none">• Up to 50% (\$4,000 max) replacement costs• Centrally ducted units qualify• Eligibility and replacement specifications based on source of leveraged funds. |
| Duct Repair/Replacement | <ul style="list-style-type: none">• Capped at \$2,500• Centrally ducted units qualify |
| Duct Seal / Insulation | <ul style="list-style-type: none">• Capped at \$1,000• Centrally ducted units qualify |

Duke Energy's Investment

- Since 2015 Duke Energy has made \$44.7 Million dollars available to assist income qualified customers residing in North Carolina.
- 5,542 families have received assistance
- 12,260 projects were completed in these homes
- NC WAP providers and other nonprofit agencies have received over \$30.6 Million in reimbursements for these completed projects
- NC WAP service providers leveraged DOE, LIHEAP, NC Housing Finance, and other private funds in 80% of the homes serviced.



NC



North Carolina
community

Action

ASSOCIATION

AMERICA'S POVERTY FIGHTING NETWORK

BLUE CROSS AND BLUE SHIELD OF NORTH CAROLINA

HEALTHY HOME INITIATIVE PROGRAM

SOPHIE MCMILLIAN & JOEL GROCE

Blue Cross NC to invest \$2 million in North Carolina Community Action Association

Blue Cross and Blue Shield of North Carolina (Blue Cross NC) is investing \$2 Million in the North Carolina Community Action Association (NCCAA), a statewide organization serving disadvantaged communities in our state. The partnership will help nearly 700 households make vital home repairs – improving the health of these families and in turn our entire state.

Source: Mountain Express, Asheville, NC

Service Territory

The service territory is 56 rural NC counties served by 10 Community Action Agencies. Rural counties were targeted since most are underserved by not having access to city/county resources available in urban communities.

Eligible Repairs Focused on Health & Safety

- Replacement of carpet with hard surface flooring (includes floor repair and clean-up service)
- Interior pest control
- General cleaning of home, including debris removal
- Interior ventilation issues – including venting/replacement of unvented heat/cooking sources (outside of other funding available)
- Air purifiers
- Carbon monoxide & smoke detectors (including battery change-out)
- Handicap accessibility/ fall prevention
- Moisture control
- Duct cleaning
- Filter change out, plus one-year replacement supply



Customer Eligibility

The Healthy Home Initiative (HHI) targets income-qualified NC residents. Customers are eligible to participate if their household income is at or below the Federal Poverty Guideline of 200% of poverty income qualification. HHI is available to owner and renter-occupied residences with landlord approval.

Allowed Spending

- Combined spending on measures installed are capped at \$2,500 per home. Participating agencies are reimbursed for all direct costs attributable to the installation of allowed measures and are paid a 7% administrative fee.
- The average Healthy Home Initiative funding spent per home to date is \$1,371

Program Results

- As of March 100 families received improvements from the Healthy Home Initiative Program since being launched in September 2018
- The Healthy Home Initiative Program Funding was leveraged with weatherization received from the U.S. Department of Energy, Low Income Energy Assistance Program (LIEAP), as well as, funding from Utilities in 95% of the homes that were assisted.

Program Results

Fifty-eight percent (58%) of participant homes assisted had chronic health conditions present. Twenty-five (25%) of the homes had children under the age of 18 who suffered chronic health conditions. Details of the chronic health conditions follow:

Alzheimer's – 2 families

Arthritis – 24 families

Asthma – 16 families

Cancer – 4 families

COPD – 4 families

Stroke – 4 families

Epilepsy – 2 family

Heart Disease – 6 families

Mental Health Issues – 14 families

Musculoskeletal Disorder – 6 families

Diabetes – 11 families

PIEDMONT NATURAL GAS LOW-INCOME WEATHERIZATION ENERGY EFFICIENCY PROGRAM

- The primary purpose of the Piedmont Natural Gas (“PNG”) Low-Income Energy Efficiency program is to provide energy efficiency measures and weatherization assistance to low-income residential customers in PNG's North Carolina service territory (“Program”). PNG’s Program is intended to create a more energy efficient and better home environment for the customers served. In addition to the actual energy savings, there can be additional benefits to the low-income customer including improved health and safety conditions, and increased comfort.

PIEDMONT NATURAL GAS

- PNG's funding is used to leverage an organizations current funding used for low-income weatherization to help reach out to more low-income residents. PNG's funding is to be used for low-income customers dwelling in single-family homes that are served under PNG's residential rate schedule ("Rate Schedule 101") and that also have an active PNG service account. In some cases, a home may still be eligible if the account is inactive due to the home needing repairs or if the home is currently unoccupied and is being repaired to get ready for new occupants. For the purposes of this Program, PNG will consider a customer to be "low-income" if their household income is within 200% of the current Federal Poverty Income guidelines.

PIEDMONT NATURAL GAS

- Where applicable, priority will be placed on providing assistance to eligible elderly individuals with disabilities and eligible families with children. Funded organizations are responsible for screening applicants and verifying the customer's household income and determine their eligibility to participate in the Program. For the purposes of this Program, organizations would also be responsible for working with PNG to track any data that PNG would need for regulatory reporting; this would include a final report that includes the level and nature of participation in the Program and an accounting of the funds utilized. Funded organizations would be responsible to abide by all applicable federal/state/local building codes and all applicable job-site safety requirements.
- Renewal of the Program is not guaranteed and depends on funding availability and the overall success of the Program.

PIEDMONT NATURAL GAS

Eligible items that could be covered through PNG's funding include (but are not limited to):

- Comprehensive in-home energy audit
- Utilization of Energy Auditor with proper credentials (i.e. training, experience, certification) and abiding by industry standard accepted Energy Audit Protocols
- Test-in and Test-Out, Combustion Safety Testing (if applicable)
- Weatherization/Energy Efficiency Measures
- Sealing major air leaks in floors and ceilings (penetrations, bypasses, chases)
- Insulating attic, side wall, and/or floors

PIEDMONT NATURAL GAS

Eligible items that could be covered through PNG's funding include (continued...):

- Sealing and insulating ducts
- Installing programmable/setback thermostat
- Evaluating, cleaning and tuning heating systems
- Water saving devices (i.e. low-flow showerheads, faucet aerators)
- Installing general heat waste measures (furnace filters, water heater insulation wrap, piping insulation, and weather-stripping)
- Carbon monoxide detector (required for each home)

PIEDMONT NATURAL GAS

Eligible items that could be covered through PNG's funding include (continued...):

- Carbon monoxide detector (required for each home)
- Any applicable building permits required by local and/or state building codes/mandates
- Energy efficiency education materials for homeowner
- Vapor diffusion retarder used in crawl spaces to improve the home's indoor air quality.
- Natural gas Equipment (i.e. furnace, water heater) – *only based on specific conditions*
- Only for the replacement of an existing unsafe/un-repairable piece of equipment and/or an unvented heating system. Based on the furnace (split system/package unit), it may also be necessary to replace the condenser due to the home's HVAC design/layout and age of the equipment. For these unique situations, please contact PNG to discuss.



Eligible items that could be covered through PNG's funding include (continued...):

- Mechanical ventilation per ASHRAE guidelines (if required to maintain safe ventilation rates after air sealing)
- Training, weatherization equipment/supplies and/or communication materials/resources (if discussed with PNG prior to)
- Agreed upon funding amount and/or percentage of administration/overhead to cover labor/supervision of projects.

Examples of items that PNG's funding would "not" cover (but are not limited to):

- Major/minor repairs related to the homes structure
- Replacement of windows and/or doors
- Major/minor roof repairs (unless for equipment mechanical venting)
- Sealed crawlspace
- Spray foam insulation (unless discussed with PNG prior to)
- Replacement of kitchen appliances and/or air-conditioner/heat pump
- Purchase/lease/maintenance of tools, equipment, and/or vehicles
- Mold, asbestos, and/or lead paint removal or abatement
- Major/minor plumbing and/or electrical repairs (unless discussed with PNG prior to)

NCHFA Urgent Repair Program

- The Agency makes Urgent Repair Program funds available to qualified organizations during each funding cycle to finance emergency home repairs and modifications for low-income homeowners with special needs. Nonprofit organizations, local governments and regional councils of governments can use the funds to provide deferred, forgiven loans of up to \$10,000 to qualified homeowners for emergency repairs. URP now provides up to \$10,000 of hard and soft cost assistance per home with a maximum of \$1,000 of soft costs.
- Your organization may be eligible to receive up to \$200,000 for projects serving two or more counties and up to \$100,000 for projects serving a single county. The maximum funding for large CDBG Entitlement Cities currently stands at \$50,000.

NCHFA Urgent Repair Program (URP) Is My Project Eligible?

To be qualified to receive URP funds, your organization and project must meet the following criteria:

- Units must house one or more full-time household members with special needs (e.g. elderly, disabled, veteran or a child 6 years of age or younger with an elevated blood-lead level).
- Household income must not exceed 50% of area median income.
- Applicants must cover service areas with a population of 5,000 or greater.
- Your organization must have the technical capacity to manage residential construction projects.



USDA Section 504 Loan/Grant Funds

Also known as the Section 504 Home Repair program, this provides loans to very-low-income homeowners to repair, improve or modernize their homes or grants to elderly very-low-income homeowners to remove health and safety hazards.

- Repairs to Mobile or Manufactured homes have some additional requirements.
- The applicant owns the home and the site prior to application.
- The Home is on a permanent foundation or will be put on a permanent foundation with funds.

USDA Section 504 Loan/Grant Funds

To qualify, you must:

- Be the homeowner and occupy the house
- Have a family income below 50 percent of the area median income
- Be unable to obtain affordable credit elsewhere
- Be age 62 or older and not be able to repay a repair loan

USDA Section 504 Loan/Grant Funds

**USDA Loan/Grant Funds Can Be Leveraged with NC Weatherization.
Some of the measures include:**

- HVAC System Replacements
- Roof Repair
- Floor Replacements
- Handicap-Accessible Ramps

USDA Section 504 Loan/Grant Funds

What are the terms of the loan/grant?

- Maximum Loan \$20,000
- Grants have a lifetime limit of \$7,500
- Grants must be repaid if the property is sold in less than 3 years

US Department of Agriculture – USDA

Cynthia Hughes & Paula Thrush



Restrictions – USDA Section 504 loan/grant funds cannot be used to:

- Assist in the construction of a dwelling.
- Make repairs to a dwelling in such poor condition that when the repairs are completed, the dwelling will continue to have major hazards.
- Move a mobile home or manufactured home from one site to another.
- Pay for any off-site improvements except for necessary installation and assessment costs for utilities.
- Refinance any debt or obligation that the applicant incurred.
- Pay packaging fee to for-profit entities.
- Provide site preparation.
- Construct new decks.
- Install concrete or asphalt driveways.
- Landscape.

*Agency Perspective on Leveraging
Syreeta Morrisey, Action Pathways*

Syreeta Morrisey

Energy Efficiency Program Director, Action Pathways

Agency Perspective on Leveraging Funds for Weatherization



US Department of Agriculture – USDA

Cynthia Hughes & Paula Thrush

Contact Info:

- Duke Helping Home Fund & Income-Qualified Weatherization Programs:
(919) 790-5757
- Blue Cross Blue Shield Healthy Home Initiative Program:
(919) 790-5757
- Piedmont Natural Gas Low-Income Weatherization Energy Efficiency Prog:
(704) 731-4205
- NC Housing Finance Agency Urgent Repair Program:
(919) 877-5627
- USDA Section 504 Loan/Grant Funds:
(919) 873-2051

Leveraging NC Weatherization - Other Resources



Department of Environmental Quality

Questions?

