

LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
 SUMMARY PAGE


Grantee: California Department of Community Services and Development Base Period: 10/1/2009 - 9/30/2010
 Address: 2389 Gateway Oaks Dr. #100 Month/Day/Year - Month/Day/Year
Sacramento, CA 95833 Estimated reporting burden = 38 hours total

Name and telephone number of person(s) to contact for further information: Andrew Signey, Acting Director (916) 576-7110

On this Summary Page, show the grand totals for all leveraged resources that the grantee proposes to count for this base period. Items B through E are to show the sums of the information from item 1 of the Resource/Benefit Description Pages, Part 1 of this form.

A. Total number of leveraged resources	B. Total gross value of countable benefits provided by these resources to low income households during this base period	C. Total amount of grantee's own funds used to leverage these resources (not including funds from grantee's Federal LIHEAP allotment)	D. Total costs/charges to low income households to participate/ receive these benefits	E. Net value of these resources/benefits (To calculate item E, subtract items C and D from item B.)
	\$1,233,734,470	\$0	\$0	\$1,233,734,470
F. Amount of funds from grantee's Federal LIHEAP allotment used to identify, develop, and demonstrate leveraging programs during this base period	\$0			
G. Final net value of leveraged resources/benefits to be counted for this base period (To calculate item G, subtract item F from item E.)	\$1,233,734,470			

I certify that, to the best of my knowledge, the information in this LIHEAP Leveraging Report is correct, and documentation to support this information is readily available and will be submitted upon request to the U.S. Department of Health and Human Services.


 Signature of Chief Executive Officer or Designee

Acting Director Title
November 22, 2010 Date

LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
SAMPLE LEVERAGING SUMMARY WORKSHEET

This sample format is voluntary. No penalties will be imposed if grantees do not submit it.

Grantee: CA Department of Community Services and Development Base Period: 10/1/2009 - 9/30/2010 Page of Leveraging Summary Worksheet pages
 Month/Day/Year - Month/Day/Year

Resource #	A. Resource/benefit name (Submit a Resource/Benefit Description Pages form for each resource/benefit listed below.)	B. Gross value of countable benefits provided by this resource to low income households during this base period	C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment)	D. Costs/charges to low income households to participate/receive these benefits	E. Net value of resource/benefits (To calculate item E for each resource/benefit, subtract items C and D from item B for that resource/benefit.)
1	Discount of Energy Costs Provided by Utility Companies: Reduction in Utility Rates	\$1,182,298,397	\$0	\$0	\$1,182,298,397
2	Utility Bill Assistance	\$4,552,343	\$0	\$0	\$4,552,343
3	Utility Company Weatherization NOT Combined With LIHEAP	\$27,080,614	\$0	\$0	\$27,080,614
4	Utility Company Weatherization Combined With LIHEAP	\$2,884,444	\$0	\$0	\$2,884,444
5	Utility Appliance Replacement Programs	\$1,997,618	\$0	\$0	\$1,997,618
6	Utility-Funded Appliance Repair and Replacement	\$8,816,671	\$0	\$0	\$8,816,671
7	Utility Company Weatherization Inspections	\$405,323	\$0	\$0	\$405,323
8	City and County Funded Energy Assistance	\$633,179	\$0	\$0	\$633,179
9	Donated Unpaid Labor and/or Weatherization Materials	\$87,398	\$0	\$0	\$87,398
10	Landlord Contribution for Weatherization and Health and Safety Related Repairs	\$37,414	\$0	\$0	\$37,414
11	Bulk Purchase Discount for Weatherization Materials	\$4,795,220	\$0	\$0	\$4,795,220
12	Discounted Fuel	\$32,549	\$0	\$0	\$32,549
13	Discount on Services Rendered	\$79,398	\$0	\$0	\$79,398

14	In-House Manufacturing	\$6,863	\$0	\$0	\$6,863	
15	Solar Rebates	\$27,039	\$0	\$0	\$27,039	
Subtotals for this page						

LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee: CA Department of Community Services and Development Base period: 10/1/2009 - 9/30/2010
 Month/Day/Year - Month/Day/Year

1. Resource # **1**

A. Resource/benefit name: Discount of Energy Costs Provided by Utility Companies: Reduction in Utility Rates

B. Gross value of countable benefits provided by resource during this base period: \$ 1,182,298,397

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): \$ 0

D. Costs and charges to low income households to participate/receive these benefits: \$ 0

E. Net value of countable benefits provided by resource during this base period (To calculate item E, subtract items C and D from item B): \$ 1,182,298,397

2. Type of resource: Cash Discount/waiver In-kind contribution

If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:

Pacific Gas & Electric, City of Gridley, Los Angeles Department of Water and Power, Southern California Gas Company, Sacramento Municipal Utility District, Southern California Edison, Modesto Irrigation District, Turlock Irrigation District, Sierra Pacific Utility District, Southwest Gas Corporation, South Tahoe Public Utilities District, San Diego Gas & Electric Company, City of Anaheim, Imperial Irrigation District, City of Banning, Bear Valley Electric, City of Lodi

4. Brief description of resource:
 10 - 30% discount on monthly energy bills

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):
 Low-income households are provided a 10%-30% discount on their monthly energy bills.

6. Geographical area in which benefits were provided:
 California - Statewide

7. Month(s) and year(s) when benefits were provided to recipients during this base period: 10/1/2009 - 9/30/2010

8. Number of low income households to whom benefits were provided in this base period: 5,218,361

9. Eligibility standard(s) for low income households to whom benefits were provided:

- Income at or below 150% of the poverty level
 Income at or below 60% of State median income
 Other--Specify: 200% of poverty level

10. Agency/agencies that administered resource/benefits:

Amador Tuolumne Community Action Agency, City of Berkeley, Community Action Agency of Butte County, Central Coast Energy Services, Community Enhancement Services, Community Resource Project, Community Services and Employment Training, Central Valley Opportunity Center, Del Norte Senior Center, El Dorado County Department of Human Services, Fresno County Economic Opportunities Commission, Lassen Economic Development Group, Mariposa County Human Services Department, Metropolitan Area Advisory Committee, Maravilla Foundation, Merced County Community Action Agency, Community Action Partnership of Orange County, Redwood Community Action Agency, Community Action Partnership of Riverside County, Community Action Partnership of San Bernardino, San Joaquin County Department of Aging, Self-Help Home Improvement Project, Community Action Partnership of San Luis Obispo County, Community Action of Ventura County.

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Records of local agencies and utility companies identified in #3.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

The benefits were quantified by the utility companies who maintain a separate rate schedule for individuals receiving a discount. On a monthly basis each utility company calculates the difference between the discounted billings and what would have been billed without the discount.

Example: The non-discounted rate is \$0.10924/kWh, the discounted rate is \$0.09271/kWh and the kWh used in the billing period is 683. Full price bill of \$74.61 (\$0.10924 X 683) less Discounted bill of \$63.32 (\$0.09271 X 683) equals a Discount of \$11.29 (\$74.61 - 63.32).

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

(i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.

(ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.

(iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

A B C D E F G H

16. If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

Local agencies and CSD coordinate the services provided under LIHEAP with existing reduced rate programs at California's larger investor-owned utilities, as well as many smaller, municipal utilities. The coordination of these programs enables the agencies to expand services to families who otherwise would not receive assistance due to lack of information about the programs. This coordination occurs through prearranged agreements between the local CSD/LIHEAP contractors and the utility companies.

The LIHEAP contractors work in direct conjunction with the utility companies by maintaining ongoing communication to screen and refer potential clients and coordinate benefits. In order to maximize the impact and effectiveness of both programs, applicants are screened to determine if the applicant from either source has already received any benefits. The applicant is provided assistance in completing an application for the reduced rate programs at the time the applicant is being assisted for HEAP.

LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee: CA Department of Community Services and Development Base period: 10/17/2009 - 9/30/2010
Month/Day/Year - Month/Day/Year

1. Resource # 2

- A. Resource/benefit name: Utility Bill Assistance
B. Gross value of countable benefits provided by resource during this base period: \$ 4,552,343
C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): \$ 0
D. Costs and charges to low income households to participate/receive these benefits: \$ 0
E. Net value of countable benefits provided by resource during this base period (To calculate item E, subtract items C and D from item B): \$ 4,552,343

2. Type of resource: xx Cash Discount/waiver In-kind contribution
If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:
The Salvation Army (various locations), Valley Churches United Missions, Kaiser, United Way, Pacific Gas and Electric, St. Vincent DePaul, Catholic Socail Services, Love Inc., St. Phillips & St. Joseph Church, First Presbyterian Church, San Diego Gas & Electric, United Way of Los Angeles, City of Riverside Public Utilities, Imperial Irrigation District, Emergency Food & Shelter Program.

4. Brief description of resource:
Assisted clients with energy bills in conjunction with LIHEAP energy assistance. Payments made directly to utility providers on behalf of low-income households.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):
Prevented the shut-off of utilities for low-income households.

6. Geographical area in which benefits were provided:
Counties of Santa Cruz, Monterey, Sacramento, Tulare, Fresno, Kern, San Diego, Mariposa, Orange, San Bernardino, San Joaquin, and desert areas of Riverside County and Riverside City.

7. Month(s) and year(s) when benefits were provided to recipients during this base period: 10/1/2009 - 9/30/2010

8. Number of low income households to whom benefits were provided in this base period: 19,838

9. Eligibility standard(s) for low income households to whom benefits were provided:
xx Income at or below 150% of the poverty level
xx Income at or below 75% of State median income
xx Other--Specify: 200% of poverty level

10. Agency/agencies that administered resource/benefits:
Central Coast Energy Services, Community Resource Project, Community Services and Employment Training, Fresno County Economic Opportunities Commission, Community Action Partnership of Kern, Metropolitan Area Advisory Committee, Community Action Partnership of Orange County, Mariposa County Human Services Department, Community Action Partnership of Riverside County, San Joaquin County Department of Aging, Community Action Partnership of San Bernardino County.
11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:
Local public and private agencies and utility company records.
12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:
Actual amount of the utility bill paid on behalf of the client.
13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)
- (i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.
- (ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.
- (iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.
14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.
Not applicable.
15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):
 A B C D E F G H
16. If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

This resource was integrated and coordinated with LIHEAP in two ways:

- a. Due to funds from both sources (LIHEAP and utility companies/third-party co-payments) being used in the same household, the low-income household benefited by receiving LIHEAP assistance in addition to assistance from either the utility company program or third-party co-payment once the LIHEAP program's maximum level of assistance was reached.

b. To ensure that low-income households have year-around access to energy assistance and that the greatest number of low-income households receive assistance, local agencies have coordinated the services provided under LIHEAP with local private and public energy assistance programs. The coordination of these programs enables the agencies to expand emergency services to families who otherwise would not receive assistance through LIHEAP due to insufficient funds. This coordination occurs through prearranged agreements between the local LIHEAP contractors and the utility assistance providers. The LIHEAP contractors work in direct conjunction with the utility assistance providers by maintaining ongoing communication to screen potential clients and coordinate benefits. In order to maximize the impact and effectiveness of both programs, applicants are screened to determine if any benefits have already been received by the applicant from either source.

LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee: CA Department of Community Services and Development Base period: 10/1/2009 - 9/30/2010
 Month/Day/Year - Month/Day/Year

1. Resource # **3**

- A. Resource/benefit name: Utility Company Weatherization NOT Combined with LIHEAP
- B. Gross value of countable benefits provided by resource during this base period: \$ 28,313,557
- C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): \$ 0
- D. Costs and charges to low income households to participate/receive these benefits: \$ 0
- E. Net value of countable benefits provided by resource during this base period (To calculate item E, subtract items C and D from item B): \$ 28,313,557

2. Type of resource: Cash Discount/waiver In-kind contribution
 If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:
Pacific Gas and Electric, Southern California Gas Company, San Diego Gas & Electric, Modesto Irrigation District, Turlock Irrigation District, Southern California Edison, Pacific Power Corporation, Southwest Gas Corporation, Bear Valley Electric.

4. Brief description of resource:
Private and municipal utility companies provided funds to weatherize LIHEAP eligible households with one or more weatherization measures

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):
See Item 4.

6. Geographical area in which benefits were provided:
CA counties of Butte, Imperial, Riverside, San Diego, Stanislaus, Fresno, Los Angeles, Kern, San Bernardino, Modoc, Santa Barbara, Shasta, Tehama, San Luis Obispo, Monterey, Ventura.

7. Month(s) and year(s) when benefits were provided to recipients during this base period: **10/1/2009 - 9/30/2010**

8. Number of low income households to whom benefits were provided in this base period: **53,980**

9. Eligibility standard(s) for low income households to whom benefits were provided:

- Income at or below 150% of the poverty level
 Income at or below 60% of State median income
 Other--Specify: 200% of poverty level

10. Agency/agencies that administered resource/benefits:

Community Action Agency of Butte County, Campesinos Unidos, Inc., Central Valley Opportunity Center, Fresno County Economic Opportunities Commission, Metropolitan Area Advisory Committee, Maravilla Foundation, Redwood Community Action Agency, Community Action Partnership of Riverside County, Community Action Partnership of San Bernardino, Community Action Commission of Santa Barbara County, Self-Help Home Improvement Project, Community Action Partnership of San Luis Obispo County, Community Action of Ventura County.

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Records of the local agencies and the utility companies identified in items 3 and 10.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

Actual costs of materials used and the labor used to install these measures. All of these costs were paid from funds provided by the utility companies.

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

(i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.

(ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.

(iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

A B C D E F G H

16. If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

Utility companies provide funds to provider agencies, allowing agencies to install additional measures in qualifying, low-income homes.

**LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES**

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee: CA Department of Community Services and Development Base period: 10/1/2009 - 9/30/2010
Month/Day/Year - Month/Day/Year

1. Resource # 4

A. Resource/benefit name: Utility Company Weatherization Combined with LIHEAP

B. Gross value of countable benefits provided by resource during this base period: \$ 2,884,444

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): \$ 0

D. Costs and charges to low income households to participate/receive these benefits: \$ 0

E. Net value of countable benefits provided by resource during this base period (To calculate item E, subtract items C and D from item B): \$ 2,884,444

2. Type of resource: Cash Discount/waiver In-kind contribution

If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:

Southern California Gas, Sacramento Municipal Utility District, Sacramento Air Quality Management District, Modesto Irrigation District, Turlock Irrigation District, Pacific Gas and Electric, San Diego Gas and Electric, Southern California Electric, City of Anaheim, Pacific Power Corporation.

4. Brief description of resource:

Utility companies provided funds to weatherize LIHEAP eligible households with one or more weatherization measures.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

See item 4.

6. Geographical area in which benefits were provided:

CA counties of Los Angeles, Sacramento, Stanislaus, Fresno, San Diego, Orange, Modoc, Santa Barbara, Ventura.

7. Month(s) and year(s) when benefits were provided to recipients during this base period: **10/1/2009 - 9/30/2010**

8. Number of low income households to whom benefits were provided in this base period: 6,353

9. Eligibility standard(s) for low income households to whom benefits were provided:

Income at or below 150% of the poverty level

Income at or below 75% of State median income

Other--Specify: 200% of poverty level

10. Agency/agencies that administered resource/benefits:
Community Enhancement Services, Community Resource Project, Central Valley Opportunity Center, Fresno County Economic Opportunities Commission, Metropolitan Area Advisory Committee, Community Action Partnership of Orange County, Redwood Community Action Agency, Community Action Commission of Santa Barbara County, Community Action of Ventura County

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households: _____
Records of the local agencies and the utility companies identified in items 3 and 10.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

Actual costs of materials used and the labor used to install these measures. All of these costs were paid from funds provided by the utility companies.

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

_____ (i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.

_____ (ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.

xx (iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

xx A xx B _____ C _____ D _____ E _____ F xx G _____ H

16. If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

This resource was integrated and coordinated with LIHEAP due to funds from both sources (LIHEAP and utility companies) being used in the same household. The low-income household, therefore, was further weatherized to prevent the loss of heated and/or cooled air from the dwelling. As a result of the coordination of the weatherization contracts, additional LIHEAP-eligible households received weatherization measures, as appropriate and as allowable within the LIHEAP contract. The client files are documented and maintained at each respective agency.

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RESOURCE/BENEFIT DESCRIPTION PAGES

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee: CA Department of Community Services and Development Base period: 10/1/2009 - 9/30/2010
Month/Day/Year - Month/Day/Year

1. Resource # 5

A. Resource/benefit name: Utility Appliance Replacement Programs

B. Gross value of countable benefits provided by resource during this base period: \$ 1,997,618

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): \$ 0

D. Costs and charges to low income households to participate/receive these benefits: \$ 0

E. Net value of countable benefits provided by resource during this base period (To calculate item E, subtract items C and D from item B): \$ 1,997,618

2. Type of resource: xx Cash ___ Discount/waiver ___ In-kind contribution

If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:

Pacific Gas and Electric, Southern California Edison, City of Anaheim Utility, Bear Valley Electric, City of Lodi.

4. Brief description of resource:

Purchase and installation of energy efficient water heaters, evaporative coolers, refrigerators, and furnaces which were used in the dwelling for the purpose of heating/cooling.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

Low-income households received energy-efficient appliances at no cost.

6. Geographical area in which benefits were provided:

CA counties of Butte, Fresno, Orange, Humboldt, San Bernardino, San Joaquin

7. Month(s) and year(s) when benefits were provided to recipients during this base period: 10/1/2009 - 9/30/2010

8. Number of low income households to whom benefits were provided in this base period: 3,802

9. Eligibility standard(s) for low income households to whom benefits were provided:

xx Income at or below 150% of the poverty level

xx Income at or below 75% of State median income

Other--Specify: 200% of poverty level

10. Agency/agencies that administered resource/benefits:

Community Action Agency of Butte County, Fresno County Economic Opportunities Commission, Community Action Partnership of Orange County, Redwood Community Action Agency, Community Action Partnership of San Bernardino, San Joaquin County Department of Aging,

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Records of local agencies and utility companies listed in #3.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

This resource was quantified by determining FMV of the appliances and the cost of installation.

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

(i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.

(ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.

xx (iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

xx A B xx C D E F G H

16. If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

This resource is coordinated with LIHEAP because LIHEAP eligible and other low-income households are identified as needing repair or replacement of appliances during the time the dwelling is being assessed for weatherization services. Additionally, the utility companies utilize a bid process to identify administering agencies. CSD-funded agencies are successful in the bid process in large part due to their experience in providing weatherization services under LIHEAP and because they are a known entity in the low-income community.

LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee: CA Department of Community Services and Development Base period: 10/1/2009 - 9/30/2010
Month/Day/Year - Month/Day/Year

1. Resource # 6

- A. Resource/benefit name: Utility-Funded Appliance Repair and Replacement
B. Gross value of countable benefits provided by resource during this base period: \$ 8,816,671
C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): \$ 0
D. Costs and charges to low income households to participate/receive these benefits: \$ 0
E. Net value of countable benefits provided by resource during this base period (To calculate item E, subtract items C and D from item B): \$ 8,816,671

2. Type of resource: xx Cash Discount/waiver In-kind contribution
If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource: Pacific Gas & Electric, Southern California Gas Company, Southern California Edison, Southwest Gas Corporation.

4. Brief description of resource: Utility companies provide funds to agencies to repair and replace appliances, and provide tune-ups of central air conditioning units.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed): Low-income households receive utility funds to repair and replace appliances.

6. Geographical area in which benefits were provided: CA counties of Amador, Calavera, Tuolumne, Santa Cruz, Monterey, San Benito, South Santa Clara, Fresno, Los Angeles, Kern, San Bernardino, Orange, Ventura, Santa Barbara.

7. Month(s) and year(s) when benefits were provided to recipients during this base period: 10/1/2009 - 9/30/2010

8. Number of low income households to whom benefits were provided in this base period: 17,768

9. Eligibility standard(s) for low income households to whom benefits were provided:
xx Income at or below 150% of the poverty level
xx Income at or below 75% of State median income
xx Other--Specify: 200% of poverty level

10. Agency/agencies that administered resource/benefits:

Amador Tuolumne Community Action Agency, Central Coast Energy Services, Fresno County Economic Opportunities Commission, Maravilla Foundation, Community Action Partnership of Orange County, Community Action Partnership of San Bernardino, Community Action of Ventura County

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:___

Records of local agency and utility companies listed in #3.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

This resource was quantified by determining the actual cost of repair and replacement.

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

___ (i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.

___ (ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.

xx (iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

xx A ___ B xx C ___ D ___ E ___ F ___ G ___ H

16. If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

This resource is coordinated with LIHEAP because LIHEAP eligible and other low-income households are identified as needing replacement of appliances during the time the dwelling is being assessed for weatherization services. Additionally, the utility companies utilize a bid process to identify administering agencies. CSD-funded agencies are successful in the bid process in large part due to their experience in providing weatherization services under LIHEAP and because they are a known entity in the low-income community.

**LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES**

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee: CA Department of Community Services and Development Base period: 10/1/2009 - 9/30/2010
Month/Day/Year - Month/Day/Year

1. Resource # **7**

- A. Resource/benefit name: Utility Company Weatherization Inspections
- B. Gross value of countable benefits provided by resource during this base period: \$ 405,323
- C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): \$ 0
- D. Costs and charges to low income households to participate/receive these benefits: \$ 0
- E. Net value of countable benefits provided by resource during this base period (To calculate item E, subtract items C and D from item B): \$ 405,323

2. Type of resource: Cash Discount/waiver In-kind contribution
If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:

Southern California Edison, Pacific Gas and Electric, Southern California Gas Company, Southwest Gas Corporation,

4. Brief description of resource:

Private utility companies provided funds to inspect weatherized LIHEAP eligible households.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

Quality control is assured for weatherized low-income households.

6. Geographical area in which benefits were provided:
CA counties of Los Angeles, Fresno, Humboldt, San Bernardino

7. Month(s) and year(s) when benefits were provided to recipients during this base period: **10/1/2009 - 9/30/2010**

8. Number of low income households to whom benefits were provided in this base period: 2,111

9. Eligibility standard(s) for low income households to whom benefits were provided:

Income at or below 150% of the poverty level
 Income at or below 60% of State median income
 Other--Specify: 200% of poverty level

10. Agency/agencies that administered resource/benefits:

Community Enhancement Services, Redwood Community Action Agency, Community Action Partnership of San Bernardino.

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Records of local agencies and the utility companies identified in item 3.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

Industry-accepted inspection cost multiplied by number of inspections.

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

(i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.

(ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.

(iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

A B C D E F G H

16. If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

Not applicable.

**LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES**

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee: CA Department of Community Services and Development Base period: 10/1/2009 - 9/30/2010
Month/Day/Year - Month/Day/Year

1. Resource # **8**

A. Resource/benefit name: City and County Funded Energy Assistance

B. Gross value of countable benefits provided by resource during this base period: \$ 633,179

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): \$ 0

D. Costs and charges to low income households to participate/receive these benefits: \$ 0

E. Net value of countable benefits provided by resource during this base period (To calculate item E, subtract items C and D from item B): \$ 633,179

2. Type of resource: Cash Discount/waiver In-kind contribution

If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:
County of Riverside

4. Brief description of resource:

City and County funds allocated for utility assistance, emergency fund accounts, and for direct weatherization measures.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

6. **Funds used for assistance with utility deposits,; emergency home repairs which enabled the installation of weatherization measures; and more extensive weatherization measures such as furnaces, insulation, and roof repairs that would not have otherwise been provided due to funding limitations.**

7. Geographical area in which benefits were provided:
CA county of Riverside.

8. Month(s) and year(s) when benefits were provided to recipients during this base period: 10/1/2009 - 9/30/2010

9. Number of low income households to whom benefits were provided in this base period: 111

10. Eligibility standard(s) for low income households to whom benefits were provided:

Income at or below 150% of the poverty level
 Income at or below 60% of State median income
 Other--Specify:

10. Agency/agencies that administered resource/benefits:

Community Action Partnership of Riverside County

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Local agency records.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

Actual costs of materials and labor used to install these measures. Actual amount of utility bill assistance paid on behalf of the low-income households. All funds were paid from local County funded contracts.

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

(i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.

(ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.

(iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

A B C D E F G H

16. If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.
Funds were used in conjunction with LIHEAP to assist with utility deposits; to repair homes prior to receiving weatherization materials and for direct weatherization of LIHEAP eligible households which would not have received assistance due to lack of funding availability. As a result of the resources generated from the County General Fund, additional LIHEAP eligible households received weatherization measures mentioned in Resource #5 as appropriate and allowable within the LIHEAP contract. The client files are documented and maintained at each respective agency.

LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee: CA Department of Community Services and Development Base period: 10/1/2009 - 9/30/2010
 Month/Day/Year - Month/Day/Year

1. Resource # **9**

A. Resource/benefit name: Donated Unpaid Labor an/or Weatherization Materials

B. Gross value of countable benefits provided by resource during this base period: \$ 87,398

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): \$ 0

D. Costs and charges to low income households to participate/receive these benefits: \$ 0

E. Net value of countable benefits provided by resource during this base period (To calculate item E, subtract items C and D from item B): \$ 87,398

2. Type of resource: Cash Discount/waiver In-kind contribution

If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:

Paint Your Heart Out, Ace and Sons, Energy Services Partnership Inc, David Hopkins Painting, David Starret Construction.

4. Brief description of resource:

Staff persons, community members, and vendors donated hours to the LIHEAP Weatherization program.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

Service to eligible LIHEAP clients. Staff/vendors assisted in the installation of weatherization materials to homes; repairing and replacing windows and doors, repairing or replacing appliances with materials paid for with private corporate donations.

6. Geographical area in which benefits were provided:

CA counties of Orange and Riverside

7. Month(s) and year(s) when benefits were provided to recipients during this base period: **10/1/2009 -- 9/30/2010**

8. Number of low income households to whom benefits were provided in this base period: **266**

9. Eligibility standard(s) for low income households to whom benefits were provided:

Income at or below 150% of the poverty level
 Income at or below 75% of State median income
 Other--Specify:

10. Agency/agencies that administered resource/benefits:

Community Action Partnership of Orange County, Community Action Partnership of Riverside County.

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Agency records: Daily staff logs and time sheets.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

Organizations donated unpaid labor. Donated labor included such tasks as installing windows and doors and appliance replacements, and other weatherization materials. The cost of donated labor was calculated using invoices, time sheets and daily staff logs.

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

(i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.

(ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.

(iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

A B C D E F G H

16. If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

Not applicable.

LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
 RESOURCE/BENEFIT DESCRIPTION PAGES

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee: CA Department of Community Services and Development Base period: 10/1/2009 - 9/30/2010
 Month/Day/Year - Month/Day/Year

1. Resource # **10**

A. Resource/benefit name: Landlord Contribution for Weatherization and Health and Safety Related Repairs

B. Gross value of countable benefits provided by resource during this base period: \$ 37,414

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): \$ 0

D. Costs and charges to low income households to participate/receive these benefits: \$ 0

E. Net value of countable benefits provided by resource during this base period (To calculate item E, subtract items C and D from item B): \$ 37,414

2. Type of resource: Cash Discount/waiver In-kind contribution

If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:

Mountain View Apartments, Oaktree Apartments.

4. Brief description of resource:

Installed weatherization measures and appliances.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

See Item 4.

6. Geographical area in which benefits were provided:
CA county of Riverside.

7. Month(s) and year(s) when benefits were provided to recipients during this base period: **10/1/2009 - 9/30/2010**

8. Number of low income households to whom benefits were provided in this base period: **331**

9. Eligibility standard(s) for low income households to whom benefits were provided:

Income at or below 150% of the poverty level
 Income at or below 60% of State median income
 Other--Specify:

10. Agency/agencies that administered resource/benefits:

Community Action Partnership of Riverside County

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Cost agreements between landlord and community action organizations based upon fair market value.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

Actual costs of materials and labor used to install stoves, refrigerators, a/c and hot water heaters. All of the costs were paid for by the landlord.

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

(i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.

(ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.

(iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

A B C D E F G H

16. If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

Coordinated with landlords to provide additional LIHEAP eligible households weatherization and appliances as appropriate and allowable within the LIHEAP contract.

**LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES**

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee: CA Department of Community Services and Development Base period: 10/1/2009 - 9/30/2010
Month/Day/Year - Month/Day/Year

1. Resource # **11**

- A. Resource/benefit name: **Bulk Purchase Discount for Weatherization Materials**
- B. Gross value of countable benefits provided by resource during this base period: \$ 4,795,220
- C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): \$ 0
- D. Costs and charges to low income households to participate/receive these benefits: \$ 0
- E. Net value of countable benefits provided by resource during this base period (To calculate item E, subtract items C and D from item B): \$ 4,795,220

2. Type of resource: Cash Discount/waiver In-kind contribution
If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:

Discounted bulk purchase of weatherization materials were made at dozens of businesses throughout California, including such businesses as Home Depot, Lowes, Meeks, A-1 Appliance, New Home Builders Supply, Entech, and other many other building-material suppliers and hardware stores.

4. Brief description of resource:

Weatherization materials purchased in bulk at discount included those needed for minor home repairs and weatherization. The minor home repairs are necessary for the effective performance or preservation of weatherization materials or to prevent air infiltration. Weatherization materials purchased included a broad range of items including wall furnaces, windows, weatherstripping, caulking, gaskets, filters, insulation and more.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

Savings from the discount on materials allowed for additional dwellings to be weatherized with one or more of the following measures: Glass replacement, low-flow showerheads, door weatherstripping, water heater blankets, water heater pipe wrap, outlet gaskets, ceiling fans, filter replacement for air conditioning or furnace units, windows, water-flow-restricting devices, furnace/boiler replacement and heating/air conditioning source repair.

Contractors must maintain a separate file for each applicant certified as eligible to receive weatherization assistance. Each file must contain an Intake and Job Order Sheet which is used for client intake, assessment of the dwelling and inspection of the weatherization measures installed; copies of source documents supporting eligibility; and a Building Check and Job Order Sheet, which is used for documenting repairs, labor hours and costs.

6. Geographical area in which benefits were provided:
CA counties of Butte, Santa Cruz, Monterey, San Benito, South Santa Clara, Tulare, San Diego, Los Angeles, Kern, San Bernardino, Humboldt, Riverside, San Joaquin, San Joaquin County Department of Aging.
7. Month(s) and year(s) when benefits were provided to recipients during this base period: 10/1/2009 - 9/30/2010

8. Number of low income households to whom benefits were provided in this base period: 19,036

9. Eligibility standard(s) for low income households to whom benefits were provided:

- Income at or below 150% of the poverty level
- Income at or below 60% of State median income
- Other--Specify:

10. Agency/agencies that administered resource/benefits:

Community Action Agency of Butte County, Central Coast Energy Services, Community Services and Employment Training, Metropolitan Area Advisory Committee, Maravilla Foundation, Redwood Community Action Agency, Community Action Partnership of Riverside County, Community Action Partnership of San Bernardino,

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Records of local agencies.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

Each local agency identified the fair market value of the items purchased and the amount actually paid. Fair market values were identified by determining what an individual would pay, in the local area, to purchase a single item. The difference between fair market value and the actual price paid is the value of this resource.

The number of households which benefited was determined by dividing each agency's average cost per dwelling into the amount of the savings. This represents the number of additional dwellings weatherized due to this resource.

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

(i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.

(ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.

(iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

- A B C D E F G H

16. If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

Direct negotiations with local suppliers of weatherization materials for the LIHEAP Program resulted in lower than market costs for materials purchased in bulk quantities. As a result of the resources generated from the discount received from these bulk purchases, additional LIHEAP eligible homes received weatherization measures as appropriate and allowable within the LIHEAP contract.

LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee: CA Department of Community Services and Development Base period: 10/1/2009-9/30/2010
Month/Day/Year - Month/Day/Year

1. Resource # 12

A. Resource/benefit name: Discounted Fuel

B. Gross value of countable benefits provided by resource during this base period: \$ 32,549

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): \$ 0

D. Costs and charges to low income households to participate/receive these benefits: \$ 0

E. Net value of countable benefits provided by resource during this base period (To calculate item E, subtract items C and D from item B): \$ 32,549

2. Type of resource: Cash xx Discount/waiver In-kind contribution
If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:

Local wood providers

4. Brief description of resource:

Discount of firewood purchased for low-income clients.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

Reduced price on wood purchased with LIHEAP funds and distributed at no charge to low-income households.

6. Geographical area in which benefits were provided: CA counties of Butte and Lassen

7. Month(s) and year(s) when benefits were provided to recipients during this base period: 10/1/2009 - 9/30/2010

8. Number of low income households to whom benefits were provided in this base period: 484

9. Eligibility standard(s) for low income households to whom benefits were provided:

- xx Income at or below 150% of the poverty level
xx Income at or below 60% of State median income
Other--Specify:

10. Agency/agencies that administered resource/benefits:

Community Action Agency of Butte County, Lassen Economic Development Group,

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Local agency and vendor records.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

Discounts were received on the cost of wood. Fair market value was compared with actual cost and agencies were given credit for the difference between the two.

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

(i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.

(ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.

(iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.
Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

A B C D E F G H

16. If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.
Not applicable.

LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee: CA Department of Community Services and Development Base period: 10/1/2009 - 9/30/2010
Month/Day/Year - Month/Day/Year

1. Resource # 13

A. Resource/benefit name: Discount on Services Rendered

B. Gross value of countable benefits provided by resource during this base period: \$ 79,398

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): \$ 0

D. Costs and charges to low income households to participate/receive these benefits: \$ 0

E. Net value of countable benefits provided by resource during this base period (To calculate item E, subtract items C and D from item B): \$ 79,398

2. Type of resource: Cash xx Discount/waiver In-kind contribution
If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:

Tierrasanta Heating, Gormsen Appliance Company

4. Brief description of resource:

Below fair market value of repair/replacement of HVAC equipment and stoves.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

Savings from the discount allowed additional low-income clients to be served.

6. Geographical area in which benefits were provided: San Diego County

7. Month(s) and year(s) when benefits were provided to recipients during this base period: 10/1/2009 - 9/30/2010

8. Number of low income households to whom benefits were provided in this base period: 213

9. Eligibility standard(s) for low income households to whom benefits were provided:

- Income at or below 150% of the poverty level
xx Income at or below 60% of State median income
Other--Specify:

10. Agency/agencies that administered resource/benefits:

Metropolitan Area Advisory Committee

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Local agency and vendor records.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

Fair market value was compared with actual cost and agencies were given credit for the difference between the two.

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

(i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.

(ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.

(iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

A B C D E F G H

16. If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

Not applicable.

LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee: CA Department of Community Services and Development Base period: 10/1/2009 - 9/30/2010
 Month/Day/Year - Month/Day/Year

1. Resource # **14**

A. Resource/benefit name: In-House Manufacturing

B. Gross value of countable benefits provided by resource during this base period: \$ 6,863

C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): \$ 0

D. Costs and charges to low income households to participate/receive these benefits: \$ 0

E. Net value of countable benefits provided by resource during this base period (To calculate item E, subtract items C and D from item B): \$ 6,863

2. Type of resource: Cash Discount/waiver In-kind contribution
 If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:

Metropolitan Area Advisory Committee, San Joaquin County Aging and Community Services

4. Brief description of resource:

In-house manufacturing of glass windows and wood sashes.

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

Materials manufactured in-house at cost enabled agencies to service more low-income households.

6. Geographical area in which benefits were provided:
CA counties of San Diego and San Joaquin

7. Month(s) and year(s) when benefits were provided to recipients during this base period: **10/1/2009 - 9/30/2010**

8. Number of low income households to whom benefits were provided in this base period: 72

9. Eligibility standard(s) for low income households to whom benefits were provided:

Income at or below 150% of the poverty level
 Income at or below 60% of State median income
 Other--Specify:

10. Agency/agencies that administered resource/benefits:

Metropolitan Area Advisory Committee

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Local agency and vendor records....

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

Actual cost charged to LIHEAP versus fair market value determined by local vendors = net countable difference.

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

(i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.

(ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.

(iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

A B C D E F G H

16. If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

Not applicable.

**LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LIHEAP LEVERAGING REPORT
RESOURCE/BENEFIT DESCRIPTION PAGES**

Complete this form for each separate leveraged resource/benefit that the grantee proposes to count for this base period. Only resources/benefits that are provided to low income households (as defined in 45 CFR 96.87(b)(6)) may be counted.

Grantee: CA Department of Community Services and Development Base period: 10/1/2009 – 9/30/2010
Month/Day/Year - Month/Day/Year

1. Resource # **15**

- A. Resource/benefit name: Solar Installation -- California Solar Initiative Rebates Combined with LIHEAP
- B. Gross value of countable benefits provided by resource during this base period: \$ 27,039
- C. Amount of grantee's own funds used to leverage this resource (not including funds from grantee's Federal LIHEAP allotment): \$ 0
- D. Costs and charges to low income households to participate/receive these benefits: \$ 0
- E. Net value of countable benefits provided by resource during this base period (To calculate item E, subtract items C and D from item B): \$ 27,039

2. Type of resource: Cash Discount/waiver In-kind contribution

If more than one type of resource is claimed: Gross value of countable benefits provided by each type of resource:

3. Source of resource:

Pacific Gas and Electric, Southern California Edison

4. Brief description of resource:

Rebates offered by investor-owned utility companies for the installation of solar (photovoltaic) systems

5. Brief description of benefit(s) provided to low income households by this resource (if benefits are different from resource as described in item 4, or if more information is needed):

Savings from the rebates allowed additional low-income clients to be served.

6. Geographical area in which benefits were provided:
Fresno County.

7. Month(s) and year(s) when benefits were provided to recipients during this base period: **10/1/2009 – 9/30/2010**

8. Number of low income households to whom benefits were provided in this base period: 32

9. Eligibility standard(s) for low income households to whom benefits were provided:

- Income at or below 150% of the poverty level
- Income at or below 60% of State median income
- Other--Specify:

10. Agency/agencies that administered resource/benefits:

Fresno County

11. Source(s) of data used to determine value of resource/benefits, and to determine associated costs to grantee and to recipient low income households:

Records of local agencies and utility companies.

12. Brief description of how resource/benefits' value was quantified and how gross value of countable benefits was calculated, and how any offsetting costs to recipient low income households were calculated; also, for discounts, reduced rate/price actually paid, and fair market value:

Utility companies offer standard rebates, based on the size of the solar system and the time it was installed (rebates reduce over time as more systems are installed statewide).

13. Criterion/criteria in 45 CFR 96.87(d)(2) that resource/benefits meet (check one or two): (Criteria are summarized below. For full text, see regulations and instructions for form.)

(i) The grantee's LIHEAP program had an active, substantive, significant role in developing and/or acquiring the resource/benefits from home energy vendor(s) through negotiation, regulation, and/or competitive bid.

(ii) The resource/benefit(s) were distributed through (within, as part of) the grantee's LIHEAP program to low income households eligible under the grantee's LIHEAP standards, in accordance with the LIHEAP statute and regulations and the grantee's LIHEAP plan.

(iii) The resource/benefit(s) were distributed to low income households as described in the grantee's LIHEAP plan, as a supplement and/or alternative to the grantee's LIHEAP program, outside (not through, within, or as part of) the LIHEAP program. They met at least one of conditions A through H demonstrating that they were integrated and coordinated with the grantee's LIHEAP program.

14. If criterion (i) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of specific role of grantee's LIHEAP program in development and/or acquisition of resource/benefits, demonstrating that involvement of LIHEAP program was active, substantive, and significant.

Not applicable.

15. If criterion (iii) is checked in item 13: Condition(s) under criterion (iii) that resource meets that demonstrate(s) resource's integration/coordination with grantee's LIHEAP program (check one or more):

A B C D E F G H

16. If criterion (iii) is checked in item 13, and resource has gross value of \$5,000 or more: Explanation of how resource/benefits were integrated and coordinated with grantee's LIHEAP program.

Not applicable.