

FY 2010 LIHEAP LEVERAGING REPORT

Grantee: Oregon Date Rec'd 11.30.10

Express: Faxed: Regular: E-Mail: Certified:

Base Period October 1, 2009 -- September 30, 2010

	SUBMITTED	Changes	FINAL
A. # of Resources	6		
B. Gross value/countable	\$28,852,275		
C. Grantee's own funds used	0		
D. Total costs/charges to low income	0		
E. Initial net value	\$28,852,275		
F. Federal LIHEAP funds	- \$35,000		
G. Final net value	\$28,817,275		
ENTERED INTO DATABASE	12/7/10 KL		

Signed by CEO (Y or N) _____

Delegation on File (Y or N) _____

Math Check: Date 12/7/10 KL

Reviewer _____

First Review Cycle

Review Complete

1st Reviewer: _____ Date: _____ 1st Reviewer: _____ Date: _____

2nd Reviewer: _____ Date: _____ 2nd Reviewer: _____ Date: _____

DEA DIRECTOR: _____ Date: _____

Additional Information

Date Requested _____

Date Received _____

Resources Changed or Deleted

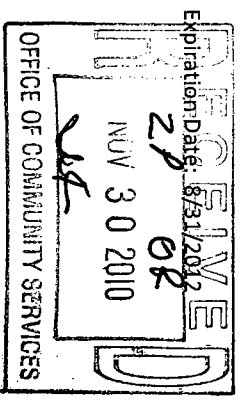
Resource # _____ Action _____

Resource # _____ Action _____

Resource # _____ Action _____

7,356,138.	+
793,891.	+
99,703.	+
20,059,598.	+
164,176.	+
378,769.	+
28,852,275.	*
28,852,275.	+
35,000.	-
28,817,275.	*

LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
 LIHEAP LEVERAGING REPORT
 SUMMARY PAGE



Grantee: Oregon Housing and Community Services (State of Oregon) Base Period: October 1, 2009 through September 30, 2010

Address: 725 Summer Street NE, Suite B

Attn: Melissa Torgerson
 Salem, OR 97301-1266

Name and telephone number of person(s) to contact for further information:

Melissa Torgerson
 503-986-2094
 melissa.torgerson@state.or.us

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.)
6	\$ 28,852,274	\$0	\$0	\$ 28,852,274
F. Amount of funds from grantee's Federal LIHEAP allotment used to identify, develop, and demonstrate leveraging programs during this base period				
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.)				
				\$ 28,817,274

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]
 Signature of Chief Executive Officer or Designee

[Signature]
 Title

[Signature]
 Date 11-30-2010

LOW INCOME HOME ENERGY ASSISTANCE PROGRAM
LEVERAGING SUMMARY WORKSHEET

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

Grantee: **Oregon Housing & Community Services (OHCS)**

Base Period: **October 1, 2009 – September 30, 2010**

Page 1 of 1 Leveraging Summary Worksheet Pages

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	Weatherization Rebates & Grants	\$ 7,356,138	--	--	\$ 7,356,138
#2	Discounts on Weatherization Products, Services	\$ 793,891	--	--	\$ 793,891
#3	Donated Energy Saving Materials & Services	\$ 99,703	--	--	\$ 99,703
#4	Fuel Assistance Funds	\$ 20,059,598	--	--	\$ 20,059,598
#5	Discounts, Waivers, Credits on Utilities and Heating Fuels	\$ 164,176	--	--	\$ 164,176
#6	Donations of Heating Fuels, Blankets, Coats, Warm Items for LIHEAP Households.	\$ 378,769	--	--	\$ 378,769
Subtotals for this page:		\$ 28,852,274			\$ 28,852,274



Oregon

Theodore R. Kulongoski, Governor



Housing and Community Services

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Salem, OR 97301-1266
(503) 986-2000



FAX (503) 986-2020
TTY (503) 986-2100
www.ohcs.oregon.gov

November 30, 2010

Mr. Nick St. Angelo, Director
Department of Health & Human Services
Division of Energy Assistance
Office of Community Services
370 L'Enfant Promenade, SW
Washington, D.C. 20447

RE: State of Oregon 2010 LIHEAP Leveraging Report

Dear Mr. St. Angelo:

Attached you will find the State of Oregon's LIHEAP Leveraging Report for 2010. Please don't hesitate to contact me if you have any questions, or need further information. I can be reached at 503-986-2094 or melissa.torgerson@state.or.us.

Sincerely,

Melissa Torgerson
Energy Policy and Programs Coordinator

Enclosure

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: **State of Oregon**Base period: **Oct 1, 2009 - Sept 30, 2010**1. Resource: **#1**A. Resource/benefit name: **Weatherization Rebates and Grants**B. Gross value of countable benefits provided by resource during this base period: **\$ 7,356,138**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): **\$ 7,356,138**2. Type of resource: **Cash: \$ 7,265,632**
In-Kind Contributions \$ 90,506

3. Source of resource:

Weatherization Grants and Rebates funded by statewide utilities. Includes legislatively mandated public purpose charge and fuel fund programs.

4. Brief description of resource:

- **Cash rebates and grants are based on the actual cost of the weatherization measures as installed. Benefits provided include standard weatherization measures: attic, floor and wall insulation, storm windows, air infiltration reduction, pipe and duct insulation, vapor barriers and other items deemed necessary during the home energy audit.**
- **In-Kind Resources consisted of paid staff and unpaid, skilled volunteer time to install approved measures which offset the cost of, and were integral to the weatherization of low-income homes.**

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 above.6. Geographical area in which benefits were provided: **Statewide**7. Month(s) and year(s) when benefits were provided to recipients during this base period: **10/1/09 – 9/30/10**8. Number of low income households to whom benefits were provided in this base period: **3396**9. Eligibility standard(s) for low income households to whom benefits were provided: **≤ 60% SMI**

10. Agency/agencies that administered resource/benefits:

Oregon Low-Income Energy Network Providers as outlined in the PY 2010 Oregon LIHEAP State Plan.

- 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:

Utility, State and Local Agency ledgers, revenue reports.

- 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:

LIHEAP program operators work with utilities or agency to install cost effective weatherization measures and obtain a rebate for installation of those measures in low income homes. Rebates allow additional measures to be completed and additional homes to receive full weatherization. Costs for all labor and materials are based on fair market value.

- 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.

LIHEAP program representative negotiated with agency and utility companies for the installation of weatherization measures to receive the rebate—and worked with utilities to develop programs which could be integrated with existing LIHEAP services.

- 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.

LIHEAP Program Eligibility and/or Assistance is necessary to obtain direct referral and access to WX Rebate and Grant resources. Noted resources are used to supplement LIHEAP Energy Assistance and WX benefits that are not sufficient to meet household energy needs.

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: **State of Oregon**

Base period: **Oct 1, 2009 - Sept 30, 2010**

1. Resource: **#2**

- A. Resource/benefit name: **Discounts on Weatherization Products and Services**
- B. Gross value of countable benefits provided by resource during this base period: **\$ 793,891**
- 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): **\$ 793,891**

2. Type of resource:

Discount/Waiver on weatherization products and services.

3. Source of resource:

Weatherization Contractors, Material Installers, Suppliers.

4. Brief description of resource:

Discounts from retail prices were provided to low-income weatherization agencies for weatherization materials to be installed in low-income families' homes.

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):

Discounts for standard weatherization products and services including attic, floor and wall insulation, storm windows, air infiltration, pipe and duct wraps, water heater wraps, vapor barriers, and other items deemed necessary for meeting home energy needs.

6. Geographical area in which benefits were provided: **Statewide**

7. Month(s) and year(s) when benefits were provided to recipients during this base period: **10/1/09 – 9/30/10**

8. Number of low income households to whom benefits were provided in this base period: **830**

9. Eligibility standard(s) for low income households to whom benefits were provided: **≤ 60% SMI**

10. Agency/agencies that administered resource/benefits:

Oregon Low-Income Energy Network Providers as outlined in the PY 2010 Oregon LIHEAP State Plan.

- 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:

Donor receipts, agency records/ledgers.

- 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:

Donated home heating fuels are valued at retail cost as determined by the vendor/donor. The values of all other in-kind contributions noted above are determined by the donor at or below market value. All resources provide a direct benefit to low income households at no-cost.

- 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.

N/A

- 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.

LIHEAP personnel identify eligibility at the time of intake, and coordinate delivery of resources to low-income families. Noted resources are used to supplement LIHEAP Energy Assistance and Weatherization benefits that are not sufficient to meet household energy needs.



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 Status: **Delivered** Proof of Delivery
 Delivered On: 12/02/2010 12:24 P.M.
 Signed By: CONTEE
 Location: OFFICE
 Delivered To: WASHINGTON, DC, US
 Shipped/Billed On: 11/30/2010
 Type: Package
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Tracking Number: 1Z3235X60295432553
Status: **Delivered** [Proof of Delivery](#)
Delivered On: 12/02/2010 12:24 P.M.
Signed By: CONTEE
Location: OFFICE
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