

ECONOMIC OPPORTUNITY STUDIES

400 NORTH CAPITOL STREET, SUITE G-80, WASHINGTON, D.C. 20001
Tel. (202) 628 4900 Fax (202) 393 1831 E-mail info@opportunitystudies.org

How Big Is Weatherization-PLUS?

2007 Leveraged Contributions Reports Compiled
MEG POWER, PHD. DECEMBER 2008

In FFY 2007, non-federal, or "leveraged", energy efficiency funding and donations of over \$319 million were delivered to low-income homes through the Department of Energy Weatherization Assistance Program (W.A.P.) state and local networks.

This figure is derived by analyzing materials from three sources, those submitted to US DHHS for awards from the LIHEAP leveraging incentive fund,¹ the annual funding survey of state W.A.P. agencies,² and state studies by our Weatherization Leveraged Partnership Project (www.weatherizationplus.org).

Weatherization PY 2007 Funding from All Sources

Funding Source	2007 Est.	# States
DOE WAP	\$204,369,058	51
LIHEAP Efficiency	\$255,868,133	44
NON-Federal	\$319,250,865	44
ALL*	\$779,488,056	51

*CA= 14% of total

Based on this re-calculation, the W.A.P. network had \$779.5 million in FY 2007 resources of which 41% was from non-federal sources, and 33% was transferred from LIHEAP. If California's large utility programs are removed from consideration, the network in 43 other states had \$665 million of which 35% was from non-federal sources. Additional WAP-coordinated resources from LIHEAP were also used, but are not the subject of this report.

When all 2007 energy affordability programs administered by any organization or government are considered - those for bill reduction and those for efficiency - the total non-federal funding leveraged in FFY 2007 was over \$3 billion. Of that sum, fully a third was in California. The California figure includes about \$80 million of energy efficiency investments not delivered by W.A.P. local agencies.

¹ Posted by the LIHEAP Clearinghouse at the National Center for Appropriate Technology.
<http://liheap.ncat.org/Supplements/2007/supplement07.htm>

² Posted at NASCSP's W.A.P. Technical Assistance Center. <http://www.waptac.org/sp.asp?id=9014>

The Non-Federal Funds Coordinated with W.A.P.

The non-federal W.A.P. leveraged funding, over \$319 million, dramatically exceeded the \$204 million of DOE funding, which reached a five-year low.³ Non-federal funds come from not only utility partnerships with Weatherizers, about 80% of the total, but also from state appropriations or designated fees, private donations of materials, equipment and personnel, and matching payments by landlords of weatherized rental units

Where Were These Funds? Leveraged funds were very unevenly distributed. Appendix A shows the combined reports. States served primarily by rural electric co-ops or by public power have little or no leveraged funding. Most Southern states have little or no utility participation in WAP partnerships. A minority of all states contribute funds from the state's own sources. Of \$319.3 million in non-federal funds:

- 7 states had no non-federal funding
- 6 states had \$500,000 or less
- 22 states had more non-federal leveraged funds in the W.A.P. network than their W.A.P. FY 2007 allocation. 13 of them had at least twice as much non-federal funding as W.A.P.

What are they for? These resources are typically used to make cost-effective energy investments in homes where the DOE average expenditure ceiling limits needed investments, especially electric baseload reduction investments and heating system upgrades. They also fund replacement of unsafe highly inefficient heating equipment which could not be purchased within the limit W.A.P. average cost ceiling. Agencies without leveraged funds not only must forgo energy-saving opportunities in a treated home; they must "defer" weatherizing many homes indefinitely where a heating system or other condition is unsafe.

More information on specific partnerships and their results is available from the Weatherization Leveraged Partnerships Project: www.weatherizationplus.org.

³ The national reports vary in scope and purpose: there is a dramatic difference between NASCSP and LIHEAP state-reported data regarding leveraged energy efficiency dollars. The EOS Leveraged Program Partnerships project independently collects information on many states' leveraged, non-federal programs, but does not conduct surveys. Appendix A shows the EOS estimates of non-federal funds in 45 states, including programs that are managed by local W.A.P. providers, but not overseen by the state W.A.P. manager. The difference in the sources of the information largely explains the difference between the NASCSP and EOS estimates. W.A.P. private partnerships typically work on different program year cycles from LIHEAP, and not all LIHEAP-leveraged funding is transferred to DOE/W.A.P. agencies. NASCSP respondents also report on the amounts of LIHEAP transferred to W.A.P.-coordinated activities and on other state or utility funds used in the W.A.P. program year; that information is not available from Clearinghouse reports. Appendix B compares these differences.

EOS estimates are \$117 million higher than those of the state managers' survey, primarily because there are direct partnerships between local W.A.P. agencies and utilities in California, Pennsylvania, Ohio, Texas, and several others.

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Appendix A

All Non-Federal Funds Leveraged by the PY 2007 Weatherization Assistance Program

Combined Survey and Case Study Data

State	Leveraging Project Estimate	Source of Funds to WAP Network
Alabama	\$300,000	Utility funds
	\$4,200,000	State AHFC Funds
Alaska		
Arizona	\$2,600,000	Utility Funds
Arkansas	\$407,437	Utility funds
California	\$84,746,000	Utility funds (est.)
Colorado	\$2,700,000	Utility
Connecticut	\$4,739,332	Utility and CDBG Funds
Delaware	\$1,034,000	Utility Funds & State Funds
Dist. Columbia	\$3,545,000	Reliable Energy Trust Fund
Florida	\$3,000,000	State Funds
Georgia	\$1,900,000	Utility funding
Hawaii		
Idaho	\$1,932,033	Utility funding
Illinois	\$7,500,000	Public Benefit Utility Funds
Indiana	\$3,500,000	Utility funds, IHEDA private funds Pilot
Iowa	\$4,823,114	Utility Funding
Kansas		
Kentucky	\$78,680	Utility funds
Louisiana	\$744,010	Utility funds
Maine	\$2,905,196	Public Benefit Utility Funds
Maryland	\$2,039,500	Utility Funds & State Funds
Massachusetts	\$22,000,000	Utility Funding
Michigan	\$9,000,000	Public Benefit Utility Funds
Minnesota	\$1,745,556	CIP Funds and PVE
Mississippi		
Missouri	\$2,908,869	Utility rate case interventions

Montana	\$2,900,000	Public Benefit Utility Funds
Nebraska		
Nevada	\$3,757,000	Utility funds
New Hampshire	\$2,117,349	Utility funds
New Jersey	\$6,725,000	Utility Funds and State
New Mexico	\$823,000	State and Utility Funds
New York	\$10,000,000	Landlord investments
North Carolina		
North Dakota		
Ohio	\$27,000,000	Public Benefit Electric Funds
Oklahoma	\$500,000	Oklahoma Energy Resources Board
Oregon	\$7,462,152	Public Benefit Utility Funds and "ECHO" Funds
Pennsylvania	\$7,000,000	Utility funds (est.)
Rhode Island	\$1,812,000	Utility funds
South Carolina	\$50,000	Utility funds
South Dakota		
Tennessee		
Texas	\$10,000,000	Utility funds
Utah	\$1,191,000	Utility funds & State Funds
Vermont	\$6,741,517	VT Weatherization Trust Fund
Virginia	\$25,000	Utility funds
Washington	\$7,200,000	Utility Funds & State 'Energy Matchmakers'
West Virginia	\$1,748,650	State and Utility Funds
Wisconsin	\$50,972,792	State and Utility Funds
Wyoming	\$2,876,678	State Funds
TOTAL	\$319,250,865	44

*Numbers in **RED** are EOS additions to other surveys. The underlying table is from the NASCSP survey

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Appendix B

How the Surveys Differ

Estimates of FY 2007 Leveraged Energy Affordability Funds, by Reporting Source

Report	All Leveraged for Low-Income	Leveraged Efficiency Assistance Only		
		Non-federal	LIHEAP transfer	All Leveraged Resources in Efficiency
NCAT site from HHS	\$2.992 billion	\$413.3 million		\$413.3 million
<i>NCAT minus CA</i>	<i>\$2.04 billion</i>	<i>\$252.3 million</i>		<i>\$252.3 million</i>
NASCSP*		\$200.2 million	\$255.9 million	\$455.9 million
<i>NASCSP minus CA</i>		<i>\$200.2 million</i>	<i>\$231.8 million</i>	<i>\$432 million</i>

* Only Funds coordinated with W.A.P. by W.A.P. network

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