

## AMENDATORY AGREEMENT

**THIS AMENDATORY AGREEMENT** is made between the **CITY AND COUNTY OF DENVER**, a municipal corporation of the State of Colorado (the “City”), and **ENERGY RESOURCE CENTER**, a Colorado non-profit organization, with its principal place of business located at 114 West Rio Grande Street, Colorado Springs, CO 80903 (the “Contractor”), jointly “the parties”.

### RECITALS

**A.** The parties entered into an Agreement dated November 9, 2016, (the “Agreement”) under which the Contractor provides to energy efficiency services, weatherization upgrades, and resident education for multi-family residential units.

**B.** The parties wish to amend the Agreement to extend its term for an additional year, increase compensation to the contractor, and modify the scope of work to be performed.

**NOW, THEREFORE**, the parties agree as follows:

**1.** All references to “Exhibit A” in the existing Agreement shall be amended to read: “Exhibits A and A-1, as applicable”. The scope of work and budget marked as Exhibit A-1 is attached and incorporated by reference. Effective as of January 1, 2018, Exhibit A-1 will govern and control the services to be provided from January 1, 2018, until December 31, 2018.

**2.** Paragraph 3 of the Agreement, entitled “**TERM**”, is amended by deleting and replacing it with the following:

“ **3. TERM:** The Agreement will commence on January 1, 2017, and will expire on December 31, 2018 (the “Term”). Subject to the Director’s prior written authorization, Contractor shall complete any work in progress as of the expiration date and the Term will extend until the work is completed or earlier terminated by the Director.”

**3.** Paragraph 4.(d)(1) of the Agreement, entitled “Maximum Contract Amount”, is amended by deleting and replacing it with the following:

“ **(d) Maximum Contract Amount**

**(1)** Notwithstanding any other provision of the Agreement, the City’s maximum payment obligation will not exceed **Six Hundred Thirty Thousand Dollars and Zero Cents (\$630,000.00)** (the “Maximum Contract Amount”). The City is not obligated to executed an Agreement or any amendments for any further services, including any services performed by Contractor beyond that specifically described in **Exhibits A and A-1**. Any services performed beyond those in

**Exhibits A and A-1** are performed at Contractor's risk and without authorization under the Agreement.”

**4.** Except as amended herein, the Agreement affirmed and ratified in each and every particular.

**5.** This Amendatory Agreement will not be effective or binding on the City until it has been fully executed by all required signatories of the City and County of Denver, and if required by Charter, approved by the City Council.

**END**

**SIGNATURE PAGES AND EXHIBIT A-1 FOLLOW THIS PAGE**

**Contract Control Number:**

IN WITNESS WHEREOF, the parties have set their hands and affixed their seals at Denver, Colorado as of

SEAL

**CITY AND COUNTY OF DENVER**

ATTEST:

By \_\_\_\_\_

\_\_\_\_\_

APPROVED AS TO FORM:

REGISTERED AND COUNTERSIGNED:

By \_\_\_\_\_

By \_\_\_\_\_

By \_\_\_\_\_



**Contract Control Number:** HRCRS-201631149-01

**Contractor Name:** ENERGY RESOURCE CENTER

By: \_\_\_\_\_

Name: Aaron Martinez  
(please print)

Title: Deputy Director  
(please print)

**ATTEST: [if required]**

By: \_\_\_\_\_

Name: \_\_\_\_\_  
(please print)

Title: \_\_\_\_\_  
(please print)



**EXHIBIT A-1**  
**SCOPE OF WORK**  
**ENERGY RESOURCE CENTER**  
**RESIDENTIAL ENERGY EFFICIENCY SERVICES**

1.0 Scope

1.1 Services: Energy Resource Center (the Contractor) shall provide energy efficiency services, weatherization upgrades, and resident education for residential units in the City and County Denver. Specific services include:

1.1.1 Outreach:

1.1.1.1 ERC will utilize numerous methods to identify eligible households in the City and County of Denver:

1.1.1.1.1 Direct mailing to Low-income Energy Assistance Program (LEAP) recipients. ERC receives a contact list of all current LEAP recipients. Letters are sent describing the households' automatic qualification for ERC's low-income programs, along with application paperwork.

1.1.1.1.2 Community outreach during neighborhood and partner agency events.

1.1.1.1.3 Neighborhood canvassing

1.1.1.1.4 Referrals from satisfied clients

1.1.2 Program Screening and Enrollment:

1.1.2.1 ERC will use a combination of Weatherization Assistance Program (WAP) guidelines and Energy Outreach Colorado's Colorado Affordable Residential Energy (CARE) program guidelines for screening and qualification of program participants. WAP prioritizes the most vulnerable households in the community; those under 200% FPL, contain a person with disabilities, elderly, and/or households with children aged 5 and under. Additionally, WAP prioritizes households with comparatively high energy burden and households that are high energy users. The CARE program serves households up to 80% of AMI, however, DOSP funds will only be leveraged in homes at or below 300% FPL.

1.1.2.2 ERC analyzes at least three months of household income to determine annualized percent of poverty. Client information is protected, securely stored, and retained for 7 years, per state and federal requirements.

All participants will meet an income standard of 300% FPL or lower.

### 1.1.3 Energy Audit:

1.1.3.1 ERC conducts thorough energy audits to Department of Energy standards. The general condition of each home will be inspected as well as the following:

- Visual inspection for existing insulation levels in attics, walls, and subspaces
- Air leakage using a blower door
- CAZ depressurization, and combustion appliance inspections, including steady-state spillage, carbon monoxide production, and gas leaks.
- Visual inspection for mold or moisture issues
- Visual inspection for materials suspected to contain asbestos
- EPA-RRP procedures concerning lead-based paint, including client information

Assessments may be conducted at any time. A full energy audit will be conducted only if there is a confirmed source for which the participant is qualified to implement at least one major upgrade need identified in the audit, either through the Contractor or through a partner organization.

### 1.1.4 Referrals:

1.1.4.1 In the event that the audit reveals needed repairs that are out of the scope of services, ERC will make every effort to refer the client to other community agencies that may be able to provide assistance. Such partners include the Denver Urban Renewal Authority, Catholic Charities, and Volunteers for America.

### 1.1.5 Minor Upgrades:

1.1.5.1 Minor upgrades include basic air sealing, not related to insulation measures, high efficiency lighting upgrades, water heater accessories such as pipe and tank insulation, aerators, showerheads and programmable thermostats. All homes served will at least receive one minor upgrade.

### 1.1.6 Major Upgrades:

1.1.6.1 Major upgrades include the following:

- Major air leakage reduction (>10% reduction)
- Furnace replacement
- Attic insulation
- Duct/Pipe insulation
- Foundation insulation
- Wall Insulation

- Refrigerator replacement

Based on historical averages, more than 98% of homes served with the weatherization program receive at least one major upgrade.

Priority will be given to measures that achieve a 5-10 year payback.

1.1.7 Education:

1.1.7.1 Client education will be conducted as part of the energy audit, reinforced by installation crews, and summarized again during the final inspection. All homes served will receive energy use education.

1.1.8 Quality Assurance:

1.1.8.1 Each home served will be inspected by a field supervisor/inspector. This inspector will not have been involved in installation of measures nor the audit of the home. The inspector will identify any quality deficiencies and direct crews to the repair of such deficiencies.

1.1.9 Follow Up:

1.1.9.1 As mentioned above, after installation of upgrades is complete, an inspection will be completed by an ERC quality control inspector. The QC inspector will summarize the work and communicate any pertinent details to the client. The QC inspector will also leave a detailed list of the upgrades completed.

1.1.9.2 All workmanship shall be warrantied for one year after completion of the job.

1.2 Projected measurable outcomes include:

Activity	Contract Goal
Total Households Served	287
Total Households Served: Outreach	3,000
Total Households Served: Education	287
Total Households Served: Audits	287
Total Households Served: Minor Upgrades	287
Total Households Served: Major Upgrades	287
Total Households Served: Attic Insulation	200
Total Households Served: Wall Insulation	100
Total Households Served: Furnace Replacements	80
Total Households Served: Incidental Repairs to receive Full Weatherization	15
Total Energy Savings: KWh	389,503
Total Energy Savings: Therms	135,757
Total Annual Household Dollar Savings	\$173,007
Total Funds Leveraged	\$2,093,856

2.0 Programmatic and Performance Requirements

2.1 Data Collection and Reporting

2.1.1 Contractor shall provide the Denver Department of Environmental Health a standard approved Excel spreadsheet with relevant building, upgrade and audit information for all DOSP funded accounts, as directed by City staff, including but not limited to the following: Address, Square footage of home, building type, heating fuel type, actual upgrades completed (if applicable), date upgrade was completed, contractor who completed upgrade, water heating type (if water heating upgrade completed), and smoke detector and CO detector data. Contractor shall also collect the PUC approved customer data release form from every DOSP funded client and provide legible, scanned copies of the form to the City on a monthly basis.



- 2.1.2 Contractor will submit a complete standard approved spreadsheet and all PUC customer data release forms to DOSP on a quarterly basis for upload.
- 2.1.3 The Contractor shall ensure its data reporting systems are compatible with City systems and meet City data reporting requirements. The Contractor shall be responsible for supplying and maintaining all required equipment and software.
- 2.1.4 The Contractor will submit a Monthly Activities Report form to accompany each invoice. The Contractor will also submit a full report detailing progress toward project outcomes on a quarterly basis to DOSP.
- 2.1.5 The Contractor's final program report shall be submitted to DOSP within 45 days after the end of the Contract.

### 3.0 Administrative Requirements

#### 3.1 Compensation and Methods of Payment

- 3.1.1 The method of payment to the Contractor by DOSP shall be in accordance with City and County of Denver Fiscal Rule 8.3, *Procedures for Accounts Payable*. The Contractor must submit expenses and accruals to DOSP on or before the 20<sup>th</sup> day of each month for the previous month's activities.
- 3.1.2 The Contractor shall be reimbursed or paid for services provided under this agreement according to the approved cost allocation budget, attached to and made a part of this Agreement.
- 3.1.3 All changes to the budget must be approved by the Project Manager. No budget adjustments will be approved between 0 and 30 days of the contract end date.
- 3.1.4 The Contractor shall follow City and County of Denver Fiscal Rule 8.1, Procurement, which requires that at least three (3) documented quotations be secured for all purchases of services (including insurance), supplies, or other property that costs more than \$5,000.00 in the aggregate.
- 3.1.5 The Contractor shall submit the final invoice for reimbursement within forty-five (45) days after the end of the contract.

#### 3.2 Communication

- 3.2.1 Contractors using website, radio or television announcements, newspaper advertisements, press releases, pamphlets, mail campaigns, or any other method to market or publicize activities funded by the Denver Office of Strategic Partnerships (DOSP) shall acknowledge DOSP as a source of funding and include the following statement in all relevant communication

material: “The funding source for this activity is the Denver Office of Strategic Partnerships.”

### 3.3 Close-Out

3.3.1 DOSP reserves the right to automatically closeout the contract after sixty (60) days if there are no disallowed costs pending. Once the contract closeout is complete, no further reimbursements will be allowed.

**Attachment 3: Program Budget and Cost Allocation Plan Summary**

Contractor Name:

**Energy Resource Center**

Program Year:

**2018**

Project :

**DOSP Residential Energy Efficiency**

Contract Dates:

1/1/2018 to 12/31/2018

Return to DOSP Project Specialist: [Emily Sumner | Emily.Sumner@denvergov.org](mailto:Emily.Sumner@denvergov.org)

Budget Category	Agency Total (All Funding Sources)	Project Costs DOSP Funding 1		Project Costs DOSP Funding 2		Total Project Costs requested from DOSP		Other City & County of Denver Funding (Add applicable funding as necessary)		Other Federal Funding		Other Non-Federal Funding		Agency Total	
		Total	Amount	%	Amount	%	Subtotal	%	Amount	%	Amount	%	Amount	%	Amount
<b>Personnel: Name and Job Title</b>															
Campbell, Chester, Production Coordinator	\$62,628.80	7,891	12.60%	-	0.00%	7,891	0.00%	-	0.00%	48,475	77.40%	6,263	10.00%	62,629	100.00%
Carter, Sonja, Intake Specialist	\$51,459.20	6,484	12.60%	-	0.00%	6,484	0.00%	-	0.00%	39,829	77.40%	5,146	10.00%	51,459	100.00%
Ceja, Gabriel, Auditor/Inspector	\$47,632.00	6,002	12.60%	-	0.00%	6,002	0.00%	-	0.00%	36,867	77.40%	4,763	10.00%	47,632	100.00%
Doss, Michael, HVAC Tech	\$54,267.20	6,838	12.60%	-	0.00%	6,838	0.00%	-	0.00%	42,003	77.40%	5,427	10.00%	54,267	100.00%
Ellison, Patrick, Wx Crew Chief	\$35,692.80	4,497	12.60%	-	0.00%	4,497	0.00%	-	0.00%	27,626	77.40%	3,569	10.00%	35,693	100.00%
Espinoza, Carlos, Intake Specialist	\$54,325.00	6,845	12.60%	-	0.00%	6,845	0.00%	-	0.00%	42,048	77.40%	5,433	10.00%	54,325	100.00%
Fakhraoui, Abdelmjid, HVAC Tech	\$52,000.00	6,552	12.60%	-	0.00%	6,552	0.00%	-	0.00%	40,248	77.40%	5,200	10.00%	52,000	100.00%
Gallegos, Hector, Wx Crew Chief	\$41,308.80	5,205	12.60%	-	0.00%	5,205	0.00%	-	0.00%	31,973	77.40%	4,131	10.00%	41,309	100.00%
Garcia, Jacob, HVAC Installer	\$34,278.40	4,319	12.60%	-	0.00%	4,319	0.00%	-	0.00%	26,531	77.40%	3,428	10.00%	34,278	100.00%
Heller, Brian, Auditor/Inspector	\$45,780.80	5,768	12.60%	-	0.00%	5,768	0.00%	-	0.00%	35,434	77.40%	4,578	10.00%	45,781	100.00%
Heppard, Walter, HVAC Supervisor	\$60,902.40	7,674	12.60%	-	0.00%	7,674	0.00%	-	0.00%	47,138	77.40%	6,090	10.00%	60,902	100.00%
Holmes, Kimberly, Schedule Coordinator	\$51,875.20	6,536	12.60%	-	0.00%	6,536	0.00%	-	0.00%	40,151	77.40%	5,188	10.00%	51,875	100.00%
Holtz, Max, Wx Tech	\$31,740.80	3,999	12.60%	-	0.00%	3,999	0.00%	-	0.00%	24,567	77.40%	3,174	10.00%	31,741	100.00%
Imhoff, Coleman, Auditor/Inspector	\$40,372.80	5,087	12.60%	-	0.00%	5,087	0.00%	-	0.00%	31,249	77.40%	4,037	10.00%	40,373	100.00%
Inman, Wesley, Wx Crew Chief	\$38,292.80	4,825	12.60%	-	0.00%	4,825	0.00%	-	0.00%	29,639	77.40%	3,829	10.00%	38,293	100.00%
Jayroe, James, Intake Specialist	\$32,198.40	4,057	12.60%	-	0.00%	4,057	0.00%	-	0.00%	24,922	77.40%	3,220	10.00%	32,198	100.00%
Kurth, Kevin, Inventory Tech	\$54,204.80	6,830	12.60%	-	0.00%	6,830	0.00%	-	0.00%	41,955	77.40%	5,420	10.00%	54,205	100.00%
Lujan, Juan, Wx Tech	\$30,867.20	3,889	12.60%	-	0.00%	3,889	0.00%	-	0.00%	23,891	77.40%	3,087	10.00%	30,867	100.00%
Martinez, Aaron, Deputy Director	\$88,000.00	11,088	12.60%	-	0.00%	11,088	0.00%	-	0.00%	68,112	77.40%	8,800	10.00%	88,000	100.00%
Potter, Samuel, Wx Tech	\$31,740.80	3,999	12.60%	-	0.00%	3,999	0.00%	-	0.00%	24,567	77.40%	3,174	10.00%	31,741	100.00%
Rarden, Cyle, Auditor/HVAC Tech	\$45,593.60	5,745	12.60%	-	0.00%	5,745	0.00%	-	0.00%	35,289	77.40%	4,559	10.00%	45,594	100.00%
Roehm, Casey, Field Coordinator	\$52,145.60	6,570	12.60%	-	0.00%	6,570	0.00%	-	0.00%	40,361	77.40%	5,215	10.00%	52,146	100.00%
Rynders, Matthew, Auditor	\$39,644.80	4,995	12.60%	-	0.00%	4,995	0.00%	-	0.00%	30,685	77.40%	3,964	10.00%	39,645	100.00%
Smith, Peter, Wx Tech	\$29,120.00	3,669	12.60%	-	0.00%	3,669	0.00%	-	0.00%	22,539	77.40%	2,912	10.00%	29,120	100.00%
Sturdivant, Elisha, Wx Tech	\$29,681.60	3,740	12.60%	-	0.00%	3,740	0.00%	-	0.00%	22,974	77.40%	2,968	10.00%	29,682	100.00%
Terrell, Gerald, Wx Tech	\$37,273.60	4,696	12.60%	-	0.00%	4,696	0.00%	-	0.00%	28,850	77.40%	3,727	10.00%	37,274	100.00%
Valenzuela, Michael, HVAC Installer	\$34,632.00	4,364	12.60%	-	0.00%	4,364	0.00%	-	0.00%	26,805	77.40%	3,463	10.00%	34,632	100.00%
Vigil, Robert, Wx Crew Chief	\$36,836.80	4,641	12.60%	-	0.00%	4,641	0.00%	-	0.00%	28,512	77.40%	3,684	10.00%	36,837	100.00%
VACANT, Wx Crew Chief	\$34,944.00	4,403	12.60%	-	0.00%	4,403	0.00%	-	0.00%	27,047	77.40%	3,494	10.00%	34,944	100.00%
VACANT, Wx Tech	\$29,120.00	3,669	12.60%	-	0.00%	3,669	0.00%	-	0.00%	22,539	77.40%	2,912	10.00%	29,120	100.00%
VACANT, Wx Tech	\$29,120.00	3,669	12.60%	-	0.00%	3,669	0.00%	-	0.00%	22,539	77.40%	2,912	10.00%	29,120	100.00%
Staff in other ERC offices (Alamosa, Colo Springs)	\$2,685,328.00	-	0.00%	-	0.00%	-	0.00%	-	0.00%	2,363,089	88.00%	322,239	12.00%	2,685,328	100.00%
<b>Total Salary:</b>	<b>4,023,008</b>	<b>168,548</b>	<b>4.19%</b>	<b>-</b>	<b>0.00%</b>	<b>168,548</b>	<b>4.19%</b>	<b>-</b>	<b>0.00%</b>	<b>3,398,453</b>	<b>84.48%</b>	<b>456,007</b>	<b>11.33%</b>	<b>4,023,008</b>	<b>100.00%</b>
<b>Fringes</b>	<b>\$334,420.05</b>	<b>42,137</b>	<b>12.60%</b>	<b>-</b>	<b>0.00%</b>	<b>42,137</b>	<b>12.60%</b>	<b>-</b>	<b>0.00%</b>	<b>258,841</b>	<b>77.40%</b>	<b>33,442</b>	<b>10.00%</b>	<b>334,420</b>	<b>100.00%</b>
<b>Personnel Total:</b>	<b>4,357,428</b>	<b>210,685</b>	<b>4.84%</b>	<b>-</b>	<b>0.00%</b>	<b>210,685</b>	<b>4.84%</b>	<b>-</b>	<b>0.00%</b>	<b>3,657,294</b>	<b>83.93%</b>	<b>489,449</b>	<b>11.23%</b>	<b>4,357,428</b>	<b>100.00%</b>
<b>Non-Personnel:</b>	Total	Amount	%	Amount	%	Subtotal	%	Amount	%	Amount	%	Amount	%	Amount	%
Operations (Materials, Tools, Equipment, Sub-Contractors)	\$1,484,927.85	67,692	4.56%	-	0.00%	67,692	4.56%	-	0.00%	1,249,724	84.16%	167,512	11.28%	1,484,928	100.00%
Operations Support	\$466,107.00	21,248	4.56%	-	0.00%	21,248	4.56%	-	0.00%	392,278	84.16%	52,581	11.28%	466,107	100.00%
Insurance	\$68,622.00	3,128	4.56%	-	0.00%	3,128	4.56%	-	0.00%	57,753	84.16%	7,741	11.28%	68,622	100.00%
Professional Services - Financial Audit	\$13,312.00	607	4.56%	-	0.00%	607	4.56%	-	0.00%	11,203	84.16%	1,502	11.28%	13,312	100.00%
Marketing	\$124,702.00	5,685	4.56%	-	0.00%	5,685	4.56%	-	0.00%	104,950	84.16%	14,067	11.28%	124,702	100.00%
Admin/Indirect	\$130,634.00	5,955	4.56%	-	0.00%	5,955	4.56%	-	0.00%	109,942	84.16%	14,737	11.28%	130,634	100.00%
<b>Total Non-Personnel</b>	<b>2,288,305</b>	<b>104,315</b>	<b>4.56%</b>	<b>-</b>	<b>0.00%</b>	<b>104,315</b>	<b>4.56%</b>	<b>-</b>	<b>0.00%</b>	<b>1,925,851</b>	<b>84.16%</b>	<b>258,139</b>	<b>11.28%</b>	<b>2,288,305</b>	<b>100.00%</b>
<b>Total Project Cost</b>	<b>6,645,733</b>	<b>315,000</b>	<b>4.74%</b>	<b>-</b>	<b>0.00%</b>	<b>315,000</b>	<b>4.74%</b>	<b>-</b>	<b>0.00%</b>	<b>-</b>	<b>0.00%</b>	<b>747,588</b>	<b>11.25%</b>	<b>6,645,733</b>	<b>100.00%</b>
<b>Program Income (through funded activities)</b>	<b>0.00</b>		#DIV/0!		#DIV/0!	-	#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	-	#DIV/0!
<b>Non-Project:</b>	Total	Amount	%	Amount	%	Subtotal	%	Amount	%	Amount	%	Amount	%		
Personnel Costs:			#DIV/0!		#DIV/0!	-	#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	-	#DIV/0!
Non-Personnel Costs:			#DIV/0!		#DIV/0!	-	#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	-	#DIV/0!
Other (Specify):			#DIV/0!		#DIV/0!	-	#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	-	#DIV/0!
<b>Total Non-Project Cost</b>	<b>-</b>	<b>-</b>	<b>#DIV/0!</b>	<b>-</b>	<b>#DIV/0!</b>	<b>-</b>	<b>#DIV/0!</b>	<b>-</b>	<b>#DIV/0!</b>	<b>-</b>	<b>#DIV/0!</b>	<b>-</b>	<b>#DIV/0!</b>	<b>-</b>	<b>#DIV/0!</b>
<b>Grand Total</b>	<b>6,645,733</b>	<b>315,000</b>	<b>5%</b>	<b>-</b>	<b>0.00%</b>	<b>315,000</b>	<b>4.74%</b>	<b>-</b>	<b>0.00%</b>	<b>-</b>	<b>0.00%</b>	<b>747,588</b>	<b>11.25%</b>	<b>6,645,733</b>	<b>100.00%</b>

## Budget Narrative

**SUMMARY:** The scope of work and types of services in this proposal is nearly identical to ERC's Federal and State contracts. In order to leverage directly against these existing programs, ERC proposes a streamlined approach to budgeting and invoicing. In projects where DOSP money is leveraged against WAP projects, a simple flat fee of \$1,250 will be applied to each project. This contribution of DOSP funds into WAP projects will allow an additional 36 homes in Denver to be served with WAP. In projects where DOSP money is leveraged against CARE projects, an evaluation of available funding for each measure will be made including DOSP, EOC grant dollars and utility rebates. The simplified budget detail provided below is based on established costs for implementing the Weatherization Assistance Program for 37 years.

**ALLOCATION METHODOLOGY:** The negotiated \$315,000 of funds represents approximately 12.6% of ERC's existing resources to deliver nearly identical services in Denver, the staffing allocations reflect this. Since ERC does not maintain an independent non-staffing budget for each office, the non-staffing costs are compared to ERC-wide budget categories, of which DOSP will comprise approximately 4.7%. Contracts for WAP and CARE can be provided upon request for review.

Please complete the fields below. Some formulas are embedded for convenience; complete the yellow fields for easiest use. It is the responsibility of the proposer to ensure accuracy of all fields and formulas.

**A. Personnel:** List each position by title, as outlined in the Cost Allocation Plan (Budget) Spreadsheet. Show the annual salary rate and the percentage of time to be devoted to the project. Compensation paid for employees engaged in grant activities must be consistent with that paid for similar work within the applicant organization and match the figures provided in the Budget Spreadsheet.

### Name/Position Computation Cost

	Salary	% of time spent on project	Estimated Cost to be billed to DOSP
<b>Example:</b>			
<b>Housing Assistant:</b>	\$ 38,450.00	50.00%	\$ 19,225.00
<i>Provides outreach to the community. Assists Housing counselor to inform customers about available services. Processes customers' applications.</i>			

	Salary	% of time spent on project	Estimated Cost to be billed to DOSP
<b>Deputy Director</b>	\$ 88,000	12.60%	\$ 11,088.00
<i>Provides contract implementation oversight, performance management, oversees invoicing and reporting.</i>			

<b>Insulation Coordinator</b>	\$ 52,145.80	12.60%	\$ 6,570.37
<i>Supervises four in-house insulation and air sealing crews.</i>			

<b>HVAC Coordinator</b>	\$ 60,902.40	12.60%	\$ 7,673.70
<i>Supervises five technicians to provide service, repair and installation of HVAC equipment, carries master</i>			

<b>Audit/Inspection Coordinator</b>	\$ 62,628.80	12.60%	\$ 7,891.23
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*Supervises a team of four auditors to provide energy audits, creation of work orders creation and quality assurance*

<b>Scheduling Coordinator</b>	\$	51,875.20	12.60%	\$	6,536.28
<i>Contacts clients to schedule audits, HVAC work and insulation work.</i>					

<b>Intake Specialists (x3)</b>	\$	137,982.60	12.60%	\$	17,385.81
<i>Coordinates the client management system, supports data collection, and conducts client intake/ outreach activities.</i>					

<b>Purchasing/Inventory Specialist</b>	\$	54,204.80	12.60%	\$	6,829.80
<i>Manages purchasing and inventory.</i>					

<b>Auditors/Inspectors (x4)</b>	\$	173,430.40	12.60%	\$	21,852.23
<i>Conducts field audits, inspects work completed by auditors and weatherization technicians.</i>					

<b>HVAC Technicians (x5)</b>	\$	220,771.20	12.60%	\$	27,817.17
<i>Assists in repairs and installation of furnaces.</i>					

<b>Insulation Crew Chiefs (x5)</b>	\$	187,075	12.60%	\$	23,571.48
<i>Supervises crews of 2 weatherization technicians to install efficiency measures.</i>					

<b>Insulation Technicians (x8)</b>	\$	248,664.00	12.60%	\$	31,331.66
<i>Performs installation of energy efficiency measures.</i>					

**All proposed program staff to be hired / employed by collaborating partner organizations should be included under the consultant / contracts cost category.**

**TOTAL PERSONNEL COST:           \$                           168,547.73**

**B. Fringe Benefits:** Fringe benefits should be based on actual known costs or an established formula. Fringe benefits expenses are only for the personnel listed in budget category (A) and only for the percentage of time devoted to the project as described above and in the Budget Spreadsheet. Below is a list of common benefit expenses. Include all benefits your agency provides employees if more are offered than those listed below.

**Name/Position Computation Cost**

<i>All Project Employees - ERC uses an average rate for fringe benefits that can be applied across all employees.</i>	Percentage of Salary	Salary	Estimated Fringe Cost to be Billed to DOSP
Employers FICA	7.65%	\$ 168,548.00	\$ 12,893.92
Health Insurance	9.35%	\$ 168,548.00	\$ 15,759.24
401 (k) match	2.00%	\$ 168,548.00	\$ 3,370.96
Workers' Compensation	5.00%	\$ 168,548.00	\$ 8,427.40
Unemployment Compensation	1.00%	\$ 168,548.00	\$ 1,685.48

\$ 42,137.00

**TOTAL FRINGE BENEFITS:                    \$                    42,137.00**

**C. Operations Costs**

<b>Item</b>	<b>Computation</b>	<b>Cost</b>
Operations (Materials, repairs)	4.6% of agency-wide operations costs (see explanation above).	\$ 67,692.00
Operations Support (Tools, Equipment)		\$ 21,248.00
Insurance		\$ 3,128.00
Financial Audit		\$ 607.00
Marketing		\$ 5,685.00
Administrative		\$ 5,955.00

<b>Item</b>	<b>Description</b>
Operations (Materials, repairs)	Materials used to install efficiency measures, costs for occasional repairs required that are incidental to efficiency measures.
Operations Support (Tools, Equipment)	6% allocated of vehicle costs, tools, fuel, maintenance, office supplies needed to support weatherization work.
Insurance	6% allocated of CGL, Auto, Excess, WC, and Employer's Liability premiums.
Financial Audit	6% allocated of total 3rd-party audit costs.
Marketing	6% allocated of expense to advertise, market, and otherwise promote ERC program for the sole purpose of engaging clientele.
Administrative	6% allocated of ERC's administrative expenses such as employee recruitment, and indirect overhead costs.

**TOTAL SUPPLIES COSTS: \$                    \$                    104,315.00**

**Total Amount Requested from  
DOSP:    \$                    315,000.00**