

## THIRD AMENDATORY AGREEMENT

**THIS THIRD AMENDATORY AGREEMENT** is made between the **CITY AND COUNTY OF DENVER**, a municipal corporation of the State of Colorado (the “City”), and **GROUNDWORK DENVER, INCORPORATED**, a Colorado nonprofit corporation with its principal place of business at with an address of 2740 West 28<sup>th</sup> Avenue, Denver, Colorado 80211 ( “Contractor”), collectively “the Parties”.

### WITNESSETH:

**WHEREAS**, the City and the Contractor entered into an Agreement dated November 27, 2012 (the “Agreement”); and

**WHEREAS**, the City and the Contractor entered into an Amendatory Agreement dated August 23, 2013; and

**WHEREAS**, the City and the Contractor entered into an Second Amendatory Agreement dated December 6, 2013; and

**WHEREAS**, the City and the Contractor wish to amend the Agreement again so as to add funds;

**NOW, THEREFORE**, in consideration of the premises and the mutual covenants and obligations herein set forth, the Parties agree as follows:

1. Exhibit A-2 is hereby deleted in entirety and replaced with **Exhibit A-3 Scope of Work**, attached and incorporated by reference herein. All references in the original Agreement to Exhibit A are changed to Exhibit A-3.

2. **Exhibit B-2 Budget**, attached and incorporated by reference herein, is hereby added to the Agreement. All references in the original Agreement to Exhibit B are changed to **Exhibits B and B-2**.

3. Subsection A of section 4 of the Agreement, entitled “**Budget**” is hereby deleted in entirety and replaced with:

“A. **Budget**: For the period commencing on January 1, 2013 through December 31, 2013, the City shall pay and the Contractor shall accept as the sole compensation for services rendered and costs incurred under the Agreement an amount not to exceed **Two Hundred Fifty Thousand Dollars and Zero Cents (\$250,000.00)** (the “Maximum Contract Amount”) in accordance with the budget set forth in **Exhibit B**. For the period commencing on January 1, 2014 through December 31, 2014, the City shall pay and the Contractor shall accept as the sole

compensation for services rendered and costs incurred under the Agreement an amount not to exceed **Three Hundred Thousand Dollars and Zero Cents (\$300,000.00)** (the “Maximum Contract Amount”) in accordance with the budget set forth in **Exhibit B-2**.

4. As herein amended, the Agreement is affirmed and ratified in each and every particular.

**END**

**SIGNATURE PAGES AND EXHIBITS FOLLOW THIS PAGE**

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**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-201208026-03

Contractor Name: GROUNDWORK DENVER INC

By: Wendy Hawthorne

Name: Wendy Hawthorne  
(please print)

Title: Executive Director  
(please print)

**ATTEST: [if required]**

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

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

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



WORK STATEMENT  
GROUNDWORK DENVER  
RESIDENTIAL ENERGY EFFICIENCY PROGRAM

1.0 Scope

1.1 Services: Groundwork Denver (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: GWD will identify low-income households through outreach to target neighborhoods, referrals from former clients and other mechanisms to determine eligibility for free weatherization services in Denver.
- 1.1.2 Program Screening, and Enrollment: All participants will meet an income standard of 300% FPL or lower. For the initial in-home energy audit and minor upgrades the family self-discloses income affirmed with signature. Documentation of income will be collected for all homes receiving major upgrades at which point they are considered enrolled.
- 1.1.3 Energy Audit: 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.

For those who cannot qualify for low-income weatherization through the County Program, GWD will visit the home to conduct an inspection of major energy uses and insulation levels, install minor upgrades and conduct air sealing, provide education, write up a description of work and qualify residents for major upgrades. This service will be provided to 150 families on a first-enrolled, first-served basis.

The Energy Audit will include: inspecting and documenting insulation levels (attic, crawlspace, walls); water heater temperature; furnace, and refrigerator efficiency; air leakage rate using a blower door; and other conditions relating to energy efficiency as needed. As part of the energy audit, we will conduct combustion safety checks on all appliances to ensure safe audit practices and help identify any health hazards prior to air sealing. We will install smoke detectors and CO detectors in all units in support of the goals of the Green and Healthy Homes Initiative (GHHI).

- 1.1.4 Weatherization Referrals: If a program participant is in need of additional services related to energy efficiency or health and safety work not provided by the Contractor and the Contractor is aware of other organizations in the community who provide those services, the Contractor will make an effort to refer participants to those other organizations. Referrals to the County Weatherization Program will be

tracked in our database and follow-up efforts will be made to those referred to determine their enrollment or need for additional assistance.

- 1.1.5 Minor Upgrades: Depending on the need at the particular house, the auditors will potentially install compact fluorescent bulbs (CFLs), a programmable thermostat, low-flow shower head, faucet aerators, water heater pipe insulation, weather-stripping, duct sealant and caulk. They will also adjust water heater and/or clean refrigerator coils. They will conduct blower-door-directed air sealing once combustion appliances have been determined to be operating safely. If needed, carbon monoxide detectors and/or smoke alarms are installed.
- 1.1.6 Major Upgrades: The audit will determine the major upgrades to be pursued based on a payback of 10 years or less. If insulation or other major upgrades are required, GWD staff will write up the description of work that will be completed by subcontractors, by GWD staff or by a subsidiary of GWD. GWD will focus on insulating attics, crawlspace walls and house walls, and replacing refrigerators using over 800 kilowatt hours per year. Additionally, if a water heater or furnace is not working properly GWD will call an HVAC or plumbing contractor to service and possibly repair the appliance. If a water heater or furnace cannot be repaired and poses a safety concern, then GWD will replace the appliance with an energy efficient one. GWD will implement the measures with a cost-effectiveness of 10 years or less up to a maximum of \$5,000 per home.

Subcontractors selected and vetted through the 2013 Request for Qualification process will be utilized to complete major upgrades in 2014. The requirements of this contract will be updated in the 2014 contracts with these subcontractors. We will work with the subcontractors to update the standard attic insulation fees on a per square footage basis while also taking into consideration local industry standards. Once prices are established, projects will be assigned on a rotating basis to the qualified subcontractors, conducted by GWD staff, or conducted by a subsidiary of GWD. This service will be provided until the funding pool of \$59,158 for this purpose is expended. In addition, a small pool of funds of \$9,000 will be maintained for combustion safety repairs necessary to make the home safe for other energy efficiency measures. A pool of funds of \$50,000 will be maintained for replacing furnaces or water heaters as needed. Another \$8,475 will be available to purchase Energy Star refrigerators.

Additionally we anticipate insulating 45 attics with approximately \$66,375 in leveraged funds.

1.1.7 Education: GWD staff members will educate residents about the monetary savings and other benefits of energy conservation and the steps necessary to achieve these benefits. Specific educational topics include: suggested thermostat settings; cold-water laundering and line drying; use, handling and recycling of CFLs; shutting off electronics at power strips; turning off lights and electronics when not in use; and use of dishwashers instead of hand-washing. The success of the educational measures will be tracked with a follow-up survey to 10% of participants three months after the Energy Audit is completed (as detailed in section 1.1.9).

1.1.8 Quality Assurance:

Contractor oversight is provided at the end of major upgrades. GWD staff inspects the work and ask the owner for permission to pay the contractor. Contractors are required to provide a one year warranty for their work and property owners are provided a copy of the signed contract with the contractor and a copy of the paid receipt for warranty follow up if needed. When applicable a permit is pulled prior to work being done.

1.1.9 Follow Up: While conducting the Energy Audit, GWD staff members will complete a pre-audit survey with the resident of the home. The pre-audit survey covers questions relating to current energy usage. Topics of note include energy savings behaviors practiced, minor or major energy efficiency improvements completed in the home prior to the audit, and current energy efficiency knowledge base. Approximately three months after the energy audit, GWD staff members follow up with 10% of the homeowners/renters and complete a post-audit survey. The post-audit survey reviews the questions from the pre-audit survey and notes any changes since the initial visit.

1.2 Projected measurable outcomes include:

	Contract goal	(Optional) Total Funds Leveraged for Activity	(Optional) Total Dollar Savings for Activity
Total Households Served	190	NA	NA
Total Households Served: Outreach	4500	NA	NA
Total Households Served: Education	150	NA	NA
Total Households Served: Audits	150	NA	NA
Total Households Served: Minor Upgrades	150	NA	9,707
Total Households Served: Major Upgrades	74	NA*	8015
Total Energy Savings: KWh	60850		
Total Energy Savings: Therms	11636		

	Contract goal	(Optional) Total Funds Leveraged for Activity	(Optional) Total Dollar Savings for Activity
Total Annual Household Dollar Savings	17722		
Total Funds Leveraged	0*		
<i>Add rows for additional outcomes</i>			

\*We will also insulate the attics of 45 households at an average cost of \$1475 per home for a total of \$66375 using leveraged, non-City, non-Federal funds. This has not been included in this table. We can adjust to include if DOSP prefers.

## 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 quarterly basis.
- 2.1.2 Contractor will submit a complete standard approved spreadsheet and all PUC customer data release forms to the Department of Environmental Health 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.

Program Budget and Cost Allocation Plan Summary															
Contractor Name:		Groundwork Denver										Program Year:		2014	
Project :		DOSP Energy Efficiency Project													
Contract Dates:		1/1/2014		to		12/31/2014		Return to DOSP Project Specialist:							
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
Personnel: Name and Job Title															
Wendy Hawthorne, Executive Director	\$71,500.00	7,150	10.00%		0.00%	7,150	10.00%	14,000	19.58%	14,000	19.58%	36,350	50.84%	71,500	100.00%
Katie Sullivan, Director of Operations	\$8,666.67	961	11.09%		0.00%	961	11.09%	-	0.00%	7,706	88.91%	-	0.00%	8,667	100.00%
Elysa Goldman, Construction and Audit Manager	\$47,000.00	19,006	40.44%	5,000	10.64%	24,006	51.08%		0.00%		0.00%	22,994	48.92%	47,000	100.00%
James Harris, Energy Auditor	\$32,000.00	13,520	42.25%	4,000	12.50%	17,520	54.75%		0.00%		0.00%	14,480	45.25%	32,000	100.00%
Glen Huitt, Energy Auditor or Mitch Ruter	\$30,420.00	15,210	50.00%		0.00%	15,210	50.00%		0.00%		0.00%	15,210	50.00%	30,420	100.00%
Patricia Barron, Scheduler and Referral Coordinator	\$24,960.00	8,736	35.00%	6,000	24.04%	14,736	59.04%		0.00%		0.00%	10,224	40.96%	24,960	100.00%
Miriam Colon, Spanish Language Outreach Specialist	\$43,710.00	21,855	50.00%		0.00%	21,855	50.00%		0.00%		0.00%	21,855	50.00%	43,710	100.00%
Danny Trujillo, Financial Manager	\$47,629.92	15,449	32.44%	2,000	4.20%	17,449	36.63%		0.00%	8,610	18.08%	21,571	45.29%	47,630	100.00%
<b>Total Salary:</b>	<b>305,887</b>	<b>101,887</b>	<b>33.31%</b>	<b>17,000</b>	<b>5.56%</b>	<b>118,887</b>	<b>38.87%</b>	<b>14,000</b>	<b>4.58%</b>	<b>30,316</b>	<b>9.91%</b>	<b>142,684</b>	<b>46.65%</b>	<b>305,887</b>	<b>100.00%</b>
<b>Fringes</b>	<b>\$46,798.00</b>	<b>14,556</b>	<b>31.10%</b>	<b>5,247</b>	<b>11.21%</b>	<b>19,803</b>	<b>42.32%</b>	<b>1,960</b>	<b>4.19%</b>	<b>4,244</b>	<b>9.07%</b>	<b>20,791</b>	<b>44.43%</b>	<b>46,798</b>	<b>100.00%</b>
<b>Personnel Total:</b>	<b>352,685</b>	<b>116,443</b>	<b>33.02%</b>	<b>22,247</b>	<b>6.31%</b>	<b>138,690</b>	<b>39.32%</b>	<b>15,960</b>	<b>4.53%</b>	<b>34,560</b>	<b>9.80%</b>	<b>163,475</b>	<b>46.35%</b>	<b>352,685</b>	<b>100.00%</b>
<b>Non-Personnel:</b>	Total	Amount	%	Amount	%	Subtotal	%	Amount	%	Amount	%	Amount	%	Amount	%
Office Expenses, Supplies & Equipment	\$13,400.00	2,412	18.00%		0.00%	2,412	18.00%	884	6.60%	1,241	9.26%	8,863	66.14%	13,400	100.00%
Communication	\$5,592.00	1,007	18.01%		0.00%	1,007	18.01%	369	6.60%	518	9.26%	3,698	66.13%	5,592	100.00%
Insurance	\$4,670.00	841	18.01%		0.00%	841	18.01%	308	6.60%	432	9.26%	3,088	66.13%	4,670	100.00%
Travel - Staff	\$2,542.00	1,271	50.00%		0.00%	1,271	50.00%		0.00%		0.00%	1,271	50.00%	2,542	100.00%
Facilities	\$36,690.00	6,604	18.00%		0.00%	6,604	18.00%	2,422	6.60%	3,397	9.26%	24,267	66.14%	36,690	100.00%
Professional Services - computer/technology	\$5,000.00	900	18.00%		0.00%	900	18.00%	330	6.60%	463	9.26%	3,307	66.14%	5,000	100.00%
Professional Services - accounting	\$9,900.00	1,782	18.00%		0.00%	1,782	18.00%	653	6.60%	917	9.26%	6,548	66.14%	9,900	100.00%
Subcontractor (Insulation and mechanical contractors)	\$209,200.00	92,100	44.02%	26,058	12.46%	118,158	56.48%		0.00%		0.00%	91,042	43.52%	209,200	100.00%
Other Direct Expense (energy efficiency and air sealing supplies)	\$30,000.00	15,000	50.00%		0.00%	15,000	50.00%		0.00%		0.00%	15,000	50.00%	30,000	100.00%
Other Direct Expense (refrigerators)	\$16,313.00	6,780	41.56%	1,695	10.39%	8,475	51.95%		0.00%		0.00%	7,838	48.05%	16,313	100.00%
Other Direct Expense (auditing tools and equipment)	\$3,464.00	1,732	50.00%		0.00%	1,732	50.00%		0.00%		0.00%	1,732	50.00%	3,464	100.00%
Other Direct Expense (postage)	\$1,624.00	812	50.00%		0.00%	812	50.00%		0.00%		0.00%	812	50.00%	1,624	100.00%
Other Direct Expense (copying)	\$3,432.00	1,716	50.00%		0.00%	1,716	50.00%		0.00%		0.00%	1,716	50.00%	3,432	100.00%
Other Direct Expense (database fees and support)	\$1,200.00	600	50.00%		0.00%	600	50.00%		0.00%		0.00%	600	50.00%	1,200	100.00%
<b>Total Non-Personnel</b>	<b>343,027</b>	<b>133,557</b>	<b>38.93%</b>	<b>27,753</b>	<b>8.09%</b>	<b>161,310</b>	<b>47.03%</b>	<b>4,967</b>	<b>1.45%</b>	<b>6,968</b>	<b>2.03%</b>	<b>169,782</b>	<b>49.50%</b>	<b>343,027</b>	<b>100.00%</b>
<b>Total Project Cost</b>	<b>695,712</b>	<b>250,000</b>	<b>35.93%</b>	<b>50,000</b>	<b>7.19%</b>	<b>300,000</b>	<b>43.12%</b>	<b>20,927</b>	<b>3.01%</b>	<b>41,528</b>	<b>5.97%</b>	<b>333,257</b>	<b>47.90%</b>	<b>695,712</b>	<b>100.00%</b>
<b>Non-Project:</b>	Total	Amount	%	Amount	%	Subtotal	%	Amount	%	Amount	%	Amount	%		
Personnel Costs:	346,272		0.00%		0.00%	-	0.00%	87,382	25.24%	165,440	47.78%	93,450	26.99%	346,272	100.00%
Non-Personnel Costs:	127,409		0.00%		0.00%	-	0.00%	65,000	51.02%	50,000	39.24%	12,409	9.74%	127,409	100.00%
<b>Total Non-Project Cost</b>	<b>473,681</b>	<b>-</b>	<b>0.00%</b>	<b>-</b>	<b>0.00%</b>	<b>-</b>	<b>0.00%</b>	<b>152,382</b>	<b>32.17%</b>	<b>215,440</b>	<b>45.48%</b>	<b>105,859</b>	<b>22.35%</b>	<b>473,681</b>	<b>100.00%</b>
<b>Grand Total</b>	<b>1,169,393</b>	<b>250,000</b>	<b>21%</b>	<b>50,000</b>	<b>4.28%</b>	<b>300,000</b>	<b>25.65%</b>	<b>173,309</b>	<b>14.82%</b>	<b>256,968</b>	<b>21.97%</b>	<b>439,116</b>	<b>37.55%</b>	<b>1,169,393</b>	<b>100.00%</b>

**Budget Narrative**  
**Groundwork Denver**  
**Residential Energy Efficiency Program 2014 – UPDATED 6/2/14 with additional \$50K**

**A. Personnel:**

**Name/Position Computation Cost**

Wendy Hawthorne, Executive Director: \$71,500 x 10% of time spent on project = \$7,150. *Provides technical oversight on energy audits and upgrades as well as general project oversight.*

Elysa Goldman, Audit and Construction Manager. \$47,000 x 51.08% = \$24,006. *Manages work descriptions, bidding and construction management. Coordinates technical side of energy auditing and implementation of minor measures.*

Miriam Colón, Spanish Language Outreach Specialist: \$43,710 x 50% of time spent on project = \$21,855. *Conducts outreach to Spanish-speaking clients, sets appointments, and provides educational part of in-home energy audit.*

James Harris, Energy Auditor. Approximately 0.65 FTE: \$32,000 x 54.75% of time spent on project = \$13,520. *Conducts energy audits and implements minor measures and air sealing in homes. Manages audit team.*

Glen Huitt or Mitch Ruter Energy Auditor. Approximately 0.65 FTE: \$30,420 x 50% of time spent on project = \$15,210. *Conducts energy audits and implements minor measures and air sealing in homes.*

Patricia Barron, Scheduler and Referral Coordinator. Approximately 0.60 FTE: \$24,960 x 59% time spent on project = \$14,736. *Follows up with people who have shown interest in the project to: assist with filling out the county weatherization application if applicable or schedule appointment for GWD audit. Post audit, assists in referral process to other programs for further health, safety and energy improvements. Data entry.*

Danny Trujillo, Financial/Grant Manager. \$47629.92 x 36.64% time spent on project = \$17,449. *Manages canvass outreach to target neighborhoods to recruit participants for the project. Oversees the database of client information including energy upgrades completed and weatherization application status. After Katie Sullivan left Groundwork Denver, Danny became Financial Manager and took on Katie's duties as well.*

Katie Sullivan, Grant Manager/Accounting: Approximately 0.90 FTE for 2 months of 2014: \$8667 x 11.09% of time spent on project = \$961. *Completed monthly invoicing and provides oversight of project budget until she left Groundwork Denver in March 2014.*

**TOTAL PERSONNEL COST: \$118,887**

**B. Fringe Benefits:**  
**Name/Position Computation Cost**

	<b>Annual Salary or Expense</b>	<b>Base for DOSP Grant per Budget</b>	<b>Rate (Set by State or Fed; or % of total salary)</b>	<b>Total for Grant Year</b>
<b>Wendy Hawthorne, Executive Director</b>				
Employers FICA	\$71,500.00	\$7,150	0.0765	\$546.98
Health/Dental/Vision/Life Insurance see tab Health Ins	\$6,716.76	\$7,150	0.1000	\$671.68
Workers' Compensation		\$7,150	0.006713	\$48.00
Unemployment Insurance		\$7,150	0.0155	\$110.83

<b>Miriam Colón, Spanish Language Outreach Specialist</b>				
Employers FICA	\$43,710.00	\$21,855	0.0765	\$1,671.91
Health/Dental/Vision/Life Insurance	\$120.96	\$21,855	0.5000	\$60.48
Workers' Compensation		\$21,855	0.006713	\$146.72
Unemployment Insurance		\$11,300	0.0155	\$175.15

<b>Elysa Goldman, Audit and Construction Manager</b>				
Employers FICA	\$47,000.00	\$24,006	0.0765	\$1,836.46
Health/Dental/Vision/Life Insurance	\$4,813.92	\$24,006	0.5108	\$2,458.79
Workers' Compensation		\$24,006	0.068925	\$1,654.61
Unemployment Insurance		\$11,300	0.0155	\$175.15

<b>James Harris, Energy Auditor</b>				
Employers FICA	\$32,000.00	\$17,520	0.0765	\$1,340.28
Workers' Compensation		\$17,520	0.068925	\$1,207.56
Unemployment Insurance		\$11,300	0.0155	\$175.15

<b>Glen Huitt/Mitch Ruter, Energy Auditor</b>				
Employers FICA	\$30,420.00	\$15,210	0.0765	\$1,163.57
Workers' Compensation		\$15,210	0.068925	\$1,048.35
Unemployment Insurance		\$11,300	0.0155	\$175.15

**Patricia Barron, Scheduler and Referral Coordinator**

Employers FICA	\$24,960.00	\$14,736	0.0765	\$1,127.30
Health/Dental/Vision/Life Insurance	\$490.80	\$14,736	0.4000	\$196.32
Workers' Compensation		\$14,736	0.0038	\$56.06
Unemployment Insurance		\$11,300	0.0155	\$175.15

**Katie Sullivan, Grant Manager/Accounting**

Employers FICA	\$52,000.00	\$961	0.0765	\$73.52
Health/Dental/Vision/Life Insurance	\$922.08	\$7,800	0.0185	\$17.04
Workers' Compensation		\$7,800	0.0038	\$29.67
Unemployment Insurance		\$7,800	0.0155	\$120.90

**Danny Trujillo, Canvass and Database Manager**

Employers FICA	\$47,629.92	\$17,449	0.0765	\$1,334.85
Health/Dental/Vision/Life Insurance	\$4,813.92	\$17,449	0.3663	\$1,763.56
Workers' Compensation		\$17,449	0.0038	\$66.38
Unemployment Insurance		\$11,300	0.0155	\$175.15

**TOTAL                      \$19,802.70**

**TOTAL FRINGE BENEFITS: \$ 19802.70**

**C. Office Expenses:** List items by type (office supplies, postage, copying paper, and other expendable items such as books, handheld tape recorders) and show the basis for computation. Generally, supplies include any materials that are expendable or consumed during the course of the project.

Item	Base amount	% allocated	Cost
General office supplies	\$3,500	0.18	\$630
General postage	\$1,900	0.18	\$342
General copying/printing	\$1,500	0.18	\$270
Office equipment purchase and maintenance	\$6,500	0.18	\$1,170

**TOTAL GENERAL SUPPLIES COSTS: \$ 2,412**

General office supplies are allocated based on the ratio of project salary to total salary for the year. Based on our 2013 budget, we expect that this project will encompass 18% of total office-based salary. General expenses are based on 2013 budget. Billing will be based on actual amounts.

**D. Communication:** List items by type (cell phones, landlines, internet, etc.) and show the basis for computation.

	Base amount	% allocated	Cost
land lines and cell phones	\$3,037	0.18	\$547
internet/web expenses	\$2,555	0.18	\$460

**TOTAL COMMUNICATION COSTS: \$ 1,007**

Communications are allocated based on the ratio of project salary to total office-based salary for the year. Based on our 2013 budget, we expect that this project will encompass 18% of total office-based salary. Phone and internet expenses are based on 2013 budget. Billing will be based on actual amounts.

**E. Insurance:** Itemize insurance expenses of project and include justification.

	Base amount	% allocated	Cost
D&O	\$1,305	0.18	\$235
Property & General Liability	\$3,098	0.18	\$558
Volunteer Accident	\$267	0.18	\$48

**TOTAL INSURANCE COSTS: \$ 841**

Total insurance costs are allocated based on the ratio of project salary to total office-based salary for the year. Based on our 2013 budget, we expect that this project will encompass 18% of total office-based salary. Insurance costs are based on 2013 rates plus 10%.

**F. Travel Staff:** Itemize travel expenses of project personnel by purpose (e.g., staff to training, field interviews, advisory group meeting, etc.).

Location	Item	Computation	Cost
Job sites	Auto miles	2,250 miles @ \$0.565/mile	\$1,271

Purpose of Travel: Local Mileage

**TOTAL TRAVEL COSTS: \$ 1,271**

Travel estimate is based on an average of 1.5 trips to 150 households at 10 miles per round trip. Mileage reimbursement of \$0.565 per mile as per federal GSA rates.

**G. Travel Client:** NONE

**H. Equipment Rental:** NONE

**I. Facilities:** List leased or rented facilities. Include a narrative describing the use of the facility. For example, provide the square footage and the cost per square foot for rent, and provide a monthly rental cost and how many months to rent.

	Base amount	% allocated	Cost
Office Rent	\$28,800	0.18	\$5,184
Office Utilities	\$3,150	0.18	\$567
Office Maintenance	\$4,740	0.18	\$853

**TOTAL FACILITIES COSTS: \$ 6,604**

Total rent and utilities costs are allocated based on the ratio of project salary to total office-based salary for the year. Based on our 2013 budget, we expect that this project will encompass 18% of total office-based salary. Rent, utility and maintenance rates are based on 2013 budget plus 50% increase as our current office space is for sale and we will have to relocate in 2014. Billing will be based on actual amounts.

**J. Educational Materials: NONE**

**K. Meetings/Events: NONE**

**L. Professional Services: For each Professional Services** enter the name, service to be provided, hourly or daily fee (8-hour day), and estimated time on the project. Indicate whether applicant's formal, written Procurement Policy or the Federal Acquisition Regulations are followed.

	Base amount	% allocated	Cost
Accountant	\$9,900	0.18	\$1,782
Computer/Technology	\$5,000	0.18	\$900

**TOTAL PROFESSIONAL SERVICES COSTS: \$ 2,682**

Accountant includes our annual audit, payroll review, quarterly tax preparation, and general bookkeeping services. Computer services include computer setup and repairs, software installation, phones and other technology trouble-shooting. Total professional services costs are allocated based on the ratio of project salary to total office-based salary for the year. Based on our 2013 budget, we expect that this project will encompass 18% of total office-based salary. Accounting costs are based on 2013 budget. Billing will be based on actual amounts.

**M. Subcontractor:** Provide the total amount of the subcontract as well as a narrative that states what will be accomplished through the contract. A fully executed subcontract must be provided to DOSP.

Subcontractors or staff working with GWD or a subsidiary of GWD will be used to install insulation. Subcontractors selected and vetted through the 2013 Request for Qualification process will be utilized to complete major upgrades in 2014. We will work with the subcontractors to update the standard attic insulation fees on a per square footage basis while also taking into consideration local industry standards. Once prices are established, projects will be assigned on a rotating basis to the qualified subcontractors, conducted by GWD staff, or conducted by a subsidiary of GWD.

Budget is based on 40 houses receiving an average of \$1,479 in insulation service (\$59,158); 22.5 homes receiving an average of \$400 in combustion safety repairs or combustion appliance tune-up (\$9,000); and 20 homes receiving an upgraded furnace or water heater with an average of \$2,500 from DOSP funds (\$50,000). The actual number of homes served will depend on the average costs of the measures installed. Measures with a payback period of 10 years or less will be installed.

**Total Subcontractor Costs: \$118,158**

**N. Construction Costs:** NONE.

**O. Other Direct Expenses:** List items (e.g., reproduction, telephone, janitorial or security services, and investigative or confidential funds) by major type and the basis of the computation.

<b>Description</b>	<b>Computation</b>	<b>Cost</b>
Minor Upgrade and Air Sealing Supplies	\$100 per home x 150 homes	\$15,000
Energy Efficient Refrigerators	\$565 per unit x 15 units	\$ 8,475
Audit tools and equipment (Includes blower door, CO meter, infrared camera and other tool replacement or repair as needed)		\$ 1,732
Direct Postage (Includes mailings of: WX applications, authorization forms for audits and upgrades, contracts)		\$ 812
Direct Copying (Includes copying: WX applications, authorization forms, contracts, audit paperwork, outreach materials)	11,440 pages x \$0.15 per page	\$ 1,716
Direct Database	1/4 annual cost for Powerbase CRM database	\$ 600

**TOTAL OTHER DIRECT COSTS: \$ 26,640**

- Minor upgrade supplies includes CFLs, shower heads, faucet aerators, programmable thermostats, and pipe insulation
- Air sealing supplies includes weather stripping, caulk, foam, and mastic
- Refrigerators will be purchased to replace existing inefficient refrigerators if a payback of 10 years or less can be demonstrated. Refrigerator will be 18-22 ft<sup>3</sup>, Energy Star, top freezer model.
- We will repair or replace tools as needed including blower door, CO testing equipment, and other small tools and equipment. We will purchase a new infrared camera which costs \$3000. \$1400 of the total cost of the infrared camera will come from DOSP budget and the remainder will be paid with leveraged funds from other sources. The additional \$332 will be for basic tool replacement.
- Direct postage includes postage for mailing weatherization applications to clients and to Veterans Green Jobs for 40 households; authorization forms to tenants and landlords for 150 households; and contracts then proof of payment for insulation, furnace/water heater replacement, and refrigerator replacement to property owners for 60 households.
- Copies of applications, audit forms, contracts, informational materials. Average of 26 pages for 190 families and the remaining 6500 pages for outreach door-to-door and mailings.
- One quarter of the annual cost for Powerbase CRM database hosting and technical support will be billed to DOSP project and the remaining costs will be paid with leveraged funds from other sources.

**P. Indirect Costs:** GWD doesn't have an approved rate.

**Q. Match Amount \$0.00**

Please refer to the solicitation for specific program requirements on match. If you provide match voluntarily, you can discuss it in the project narrative but should not include it in the budget or budget narrative.

**Total Amount Requested from DOSP: \$300,000**