



Board Orientation
June 21, 2021

Welcome & Introductions

Inita Smith, Board Chair

Stephanie Ashley, Executive Director

Who We Are

History

- ❑ 1964: Economic Opportunity Act of 1964 was passed as part of President Johnson's "War on Poverty" which created the federal Office of Economic Opportunity and resulted in the establishment of Community Action Programs.
- ❑ A Community Action Program (CAP) was defined as a "program which provides services, assistances, and other activities of sufficient scope and size to give promise of progress toward elimination of poverty or a cause or causes of poverty through developing employment opportunities, improving human performance, motivation, and productivity, or bettering the conditions under which people live, learn, and work."
- ❑ 1965: Burke and Caldwell citizens groups joined together to form Blue Ridge Community Action. We are a private non-profit agency.
- ❑ 1967: Amendments were passed that required local government designation of CAAs and created the tri-partite Community Action Board structure that exists today.

History (continued)

- ❑ In the United States and its territories, Community Action Agencies (CAAs) are local private and public non-profit organizations that carry out the mission of CAPs.
- ❑ 1974: The Economic Opportunity Act was terminated in 1973 and replaced with the Community Service Act of 1974.
- ❑ 1981: The Economic Opportunity Act was rescinded and the Community Service Administration abolished. It was then replaced by the Community Service Block Grant (CSBG) Act which delegated responsibility for the administration of Community Action Agencies to the states.
- ❑ The Community Service Block Grant (CSBG) is the agencies' core federal funding. Agencies also operate a variety of grants that come from federal, state, and local sources. These grants vary widely among agencies to include Head Start, Early Head Start, Low-Income Home Energy Assistance Program (LIHEAP), Weatherization Assistance Program, Community Housing Development Organization, etc.

History (continued)

- ❑ 1993: The Government Performance and Results Act mandated that all federally-funded programs be able to establish performance goals and measureable results in response to a renewed emphasis on accountability.
- ❑ 1994: Six national goals were developed along with a performance based system of management and accountability called ROMA (Results Oriented Management and Accountability).
- ❑ 1998: Reauthorization of the CSBG Act.
- ❑ 2005: Mandated reporting to include National Indicators of Community Action Performance.
- ❑ 2010: The Government Performance and Results Act Modernization Act set new expectations for focusing on analyzing data on results to improve programs.
- ❑ 2015: The Organizational Standards were launched to provide additional performance management.

Blue Ridge Community Action, Inc.

- ❑ Incorporated in 1965
- ❑ Agency Leadership
 - ❑ C.H. Crabtree (1965)
 - ❑ James W. Cooper (1970)
 - ❑ Kenneth L. Cox (1973)
 - ❑ Mattie Patterson (1998)
 - ❑ Stephanie E. Ashley (2019)
- ❑ Blue Ridge Community Action is original name.
- ❑ Original Counties: Burke and Caldwell counties (1965)
- ❑ Primary Counties: Burke, Caldwell, and Rutherford (2013) counties.
- ❑ Expanded Services Counties: Alexander, Catawba, Cleveland, Gaston, McDowell, Mecklenburg, Stanly and Union Counties.

Blue Ridge Community Action, Inc.'s Promise

Our Mission

"Helping People, Changing Lives"

Our Vision

"To impact service area counties in a positive manner to assure that all residents will obtain and maintain self-sufficiency."

Blue Ridge Community Action, Inc. Programs



Programs	Funding Source
Information and Referral	Community Service Block Grant – United States Department of Health and Human Services (US DHHS)
Self-Sufficiency Program	Community Service Black Grant – US DHHS
Circles USA	Community Foundation; Volunteers
Home Delivered Meals	Home and Community Care Block Grant (HCCBG) - NCDHHS
Congregate Nutrition	Home and Community Care Block Grant (HCCBG) – NC DHHS
Senior Community Service Employment Program (SCSEP)	US Department of Labor
Foster Grandparents Program	Corporation for National and Community Service
Adult Day Care	Fee for Service
Child Day Care	Fee for Service

Programs	Funding Source
Head Start	US Department of Health and Human Services and Child and Adult Care Food Programs (CACFP)
Early Head Start	US Department of Health and Human Services and Child and Adult Care Food Programs (CACFP)
NC Pre-K	NCDHHS – Division of Child Development and Early Education
Weatherization Assistance Program	US Department of Energy (DOE) and Low-Income Home Energy Assistance Program (LIHEAP)
Heating and Air Replacement/Repair Program	Low-Income Home Energy Assistance Program (LIHEAP)
Duke Energy’s Weatherization Assistance Program	Duke Energy
Rental Project	Fee for Service
Volunteer Income Tax Assistance (VITA) program	Internal Revenue Service

Board Structure, Function, & Operations

Tripartite Board Composition

This structure is federally mandated in the operation of Community Service Block Grant funded programs. The Board of Directors consists of 15 members with representation from Burke, Caldwell, and Rutherford Counties.

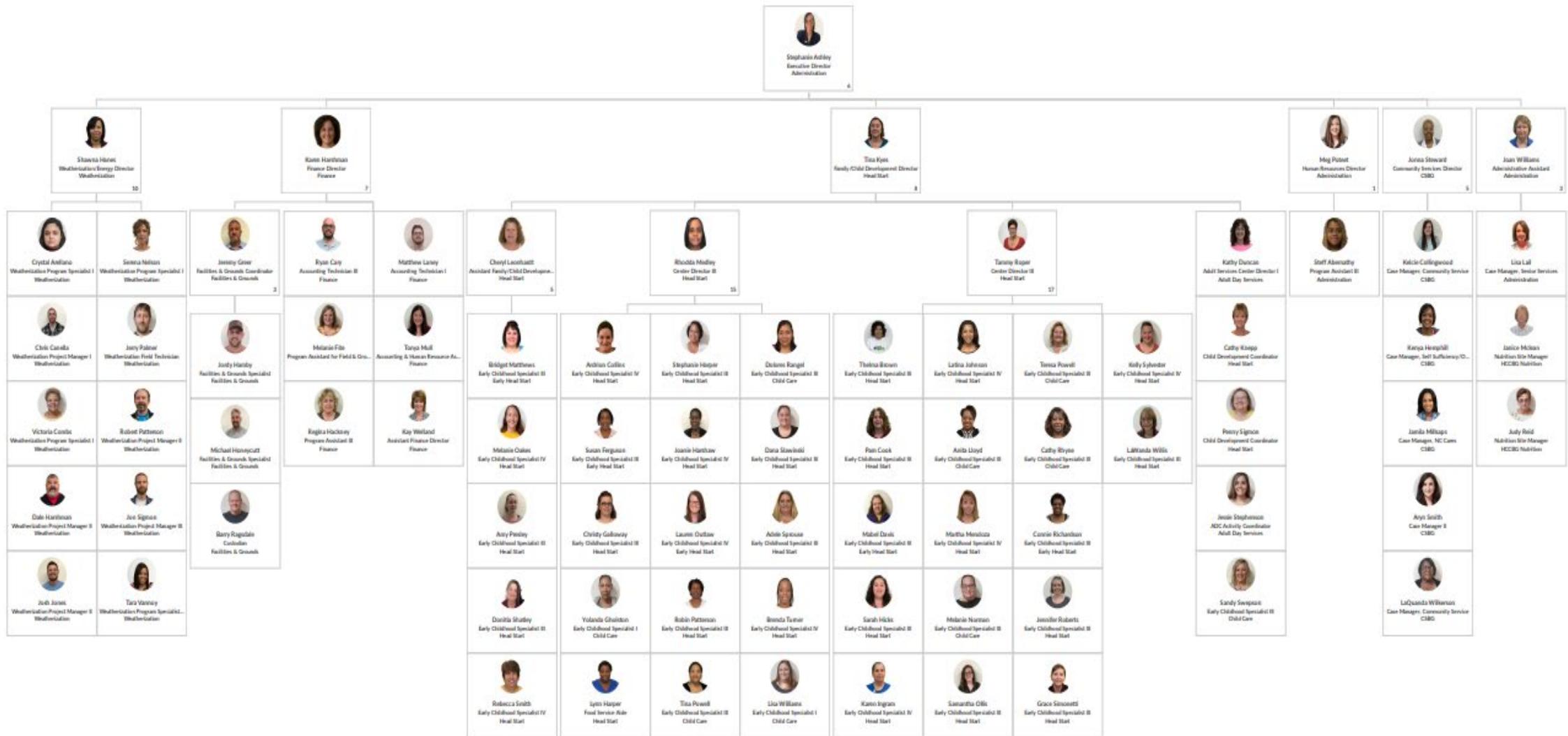
- ❑ **Representation of Public Officials** - One-third of the directors should be elected public officials currently holding office.
- ❑ **Representation of the Low-Income** - Not less than one-third of the directors should represent the low income; reside within the target areas they represent; and must be democratically elected.
- ❑ **Representation of Private Organizations** - The remainder of the directors can be less than one-third but not more; represent officials of industry, labor, religious, minority, welfare, education, or other major groups and interests in the community.

Organizational Structure

Board Roles & Responsibilities



Blue Ridge Community Action, Inc. 21-22 Organizational Chart



Staffing Statistics (2021-2022)

We currently have 81 employees

- ❑ Exempt – 11 employees
 - ❑ 1 Male
 - ❑ 10 Females
- ❑ Average years of service - 17
- ❑ Non-Exempt - 70 employees
 - ❑ 11 Males
 - ❑ 59 Females
- ❑ Average years of service - 9

Board Role and Responsibilities

- ❑ To advance Blue Ridge Community Action, Inc.'s mission of community action by the development and oversight of resources, plans and policies which address pressing community needs and assures that the management of agency assets conforms with applicable legal, fiduciary, and ethical best practice standards in accordance with agency policies as well as state and federal regulations and guidelines.
 - ❑ Formulates and approves policies which promote the achievement of the agency's mission and guides management operations;
 - ❑ Hires annually evaluates and as necessary discharges the agency's Executive Director;
 - ❑ Establishes strategic organizational goals and monitors achievement;
 - ❑ Recruits and elects members and officers;
 - ❑ Approve agency budget and oversees the prudent management of agency assets and finances;
 - ❑ Approves the establishment of all agency programs and evaluates their effectiveness in meeting community needs using ROMA standards;
 - ❑ Assists in raising funds needed to develop and maintain the fiscal health of the agency;

Board Role and Responsibilities (continue)

- ❑ Attends and actively participates in all Board and assigned Committee meetings;
- ❑ Carefully reviews all materials and information circulated in anticipation of Board deliberations and decision-making;
- ❑ Always acts in the best interest of the agency and behaves in a manner that conforms to agency policies regarding loyalty, ethical behavior, and conflict-of-interest;
- ❑ Becomes familiar with agency Bylaws, policies and rules of procedures to facilitate appropriate and effective Board decision-making;
- ❑ Avoid unauthorized and inappropriate interaction with agency employees, volunteers, and consumers;
- ❑ Makes every effort to understand the needs of the community and act as an ambassador in marketing the agency to key stakeholders;
- ❑ Participates in both trainings and periodic assessments of Board effectiveness in order to improve productivity and participation to include conducting self assessment and evaluation; and
- ❑ Remember the Board is advisory and made up of volunteer members.

Ethics

is an individual's beliefs about whether a decision, behavior, or action is right or wrong.

- ❑ Board members are prohibited from participating matters that involve an economic or fiduciary interest with Blue Ridge Community Action, Inc. This includes accepting gifts from persons doing business with BRCA.
- ❑ Board members should avoid ANY conflict of interest (i.e. voting on decisions from which they may receive possible personal gain). Board members should abstain from any vote that might benefit them or a relative.
- ❑ Federal performance standards require that BRCA members review and sign a statement acknowledging the Agency's Ethics guidance.
- ❑ Some common ethics and compliance issues in organizations: accepting and giving gifts; conflict of interest; handling of confidential information; document retention and destruction; impartiality in performing duties; misuse of position; and dealing with diversity and discrimination.

Relationship with Funding Agencies (Federal, State & County)

- ❑ Reporting: BRCA reports the programmatic outcome showing that goals are being accomplished and funding have been expended.
- ❑ Review: the Board reviews the Agency programs and budget and advises the Agency.
- ❑ Governance: the Board is the governing body for the agency.

Relationship with the Community

- ❑ Public Education: Board members work to increase the public's awareness of poverty, BRCA, and Board priorities.
- ❑ Collaboration: Board members work with other groups to promote the goals and programs of BRCA.



BRCA Site Locations



Quaker Meadows Generations
800 North Green Street
Morganton NC 28655



Northside Children's Learning
Center
1440 Blowing Rock Blvd
Lenoir NC 28645



Circle Of Friends
240 Bravard Street
Rutherford College NC 28671

What you need to know?

Joan Williams, Administrative Assistant



- ❑ The Board of Directors meets on the 3rd Monday of every month at 12 PM. These meetings are normally held in the Morganton Office – at 800 North Green Street.
- ❑ There are times that the need will arise to have a special called meetings.
- ❑ Other Committee meetings are scheduled by the committee members and in some cases the liaison staff.
- ❑ Mileage reimbursement is available for all Board meetings.

Executive Committee:

C. Inita Smith, Chairperson

Hilary Ventura, Vice Chair

Barbara Myers, Secretary/Treasurer

Mary Johnson, Planning Committee Chair

Annie Logan, Personnel Committee Chair

This Committee acts on behalf of the Board between regular meetings and makes decisions that are not assigned to other committees.

Financial Performance

An Overview of Financial Performance

Karen Harshman, Chief Financial Officer/Compliance Officer

Agenda

- ❑ Approved agency budget for fiscal year 2021-2022
- ❑ Statement of Financial Position (Sample)
- ❑ Revenue and Expenditure Report (Sample)
- ❑ Credit Card Report (Sample)

Approved Agency Budget FY 2021-2022

Program Prepared by: <u>KGH</u> Date: <u>8/24/2021</u>		BLUE RIDGE COMMUNITY ACTION, INC											Admin Reviewed by: _____ Date: _____	
Finance Reviewed by: _____ Date: _____		Agency Wide Revenue Budget											Board Approved Date: _____	
AWRev22		FYE 6-30-22												
Programs	JULY	AUG	SEPT	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	Budget Total	
VITA	796	761	726	796	726	761	796	817	1,086	8,006	726	761	16,758	
Circles	2,708	2,708	2,708	2,708	2,708	2,708	2,708	2,708	2,708	2,708	2,708	2,712	32,500	
HS 20 T&TA	2,363	1,765	1,765	1,765	1,765	2,265	1,765	1,765	2,764	1,764	1,764	2,768	24,278	
HS 22 Prog	82,521	102,925	181,809	175,812	170,307	181,317	170,307	168,906	181,317	175,812	170,307	94,872	1,856,212	
HS 22 Adm	17,700	19,043	33,046	33,586	31,968	34,394	32,508	30,619	34,394	33,316	31,968	19,884	352,426	
HS 26 Prog	5,229	5,045	4,860	5,229	4,860	5,045	5,229	4,676	5,045	5,045	4,860	5,043	60,166	
HS 26 ADM	964	929	893	964	893	929	964	858	929	929	893	929	11,074	
HS/EHS Inkind	51,347	51,347	51,347	51,347	51,347	51,347	51,347	51,347	51,347	51,347	51,347	51,347	616,158	
EHS	34,712	35,982	32,267	34,712	32,267	33,489	34,712	31,044	33,489	28,537	32,267	33,567	397,045	
EHS T & TA	725	475	475	475	475	725	475	475	475	475	475	475	6,200	
HS Summer	132,810	132,813											265,623	
HS American Res	66,815												66,815	
DOE Prog	47,972	48,297	48,297	47,134	48,297	48,297	47,134	45,971	49,460	47,134	48,297	47,915	574,205	
DOE Adm	3,792	3,792	3,792	3,792	3,792	3,792	3,792	3,792	3,792	3,792	3,792	3,794	45,506	
DOE T&TA	3,774	3,774	3,774	3,774	3,774	3,774	3,774	3,774	3,774	3,774	3,774	3,773	45,287	
DUKE DEC HVAC	32,415	32,415	32,415	32,415	32,415	32,415	32,415	32,415	32,415	32,415	32,415	32,415	388,980	
LIHEAP	106,727	106,727	106,727	105,316	106,727	106,727	105,316	103,905	108,138	105,316	106,727	106,728	1,275,081	
LIHEAP ADM	6,261	6,261	6,261	5,983	6,261	6,261	5,983	5,705	6,538	5,983	6,261	6,260	74,018	
HARRP	77,552	77,552	77,552	76,825	77,552	77,552	76,825	76,097	78,279	76,825	77,552	77,558	927,721	
HARRP Admin	3,425	3,425	3,425	3,282	3,425	3,425	3,282	3,139	3,568	3,282	3,425	3,423	40,526	
CHDO Rental	23,886	23,886	23,886	23,886	23,886	23,886	23,886	23,886	23,886	23,886	23,886	23,886	286,632	
SCSEP	40,957	40,957	40,957	40,668	40,957	42,665	40,668	40,380	41,245	40,668	40,957	42,744	493,823	
FGP	23,212	22,693	22,693	22,482	22,693	22,693	22,482	22,272	22,903	22,482	22,693	22,685	271,983	
HCCBG ADC	7,500	7,500	7,500	7,500	7,500	7,500	7,500	7,500	7,500	7,500	7,500	7,500	90,000	
C-1 Cald	5,069	5,110	5,687	5,282	5,069	5,069	4,982	4,896	5,155	4,982	5,069	5,067	61,437	
C-2 Cald	10,953	10,953	10,953	10,832	10,953	10,953	10,831	10,710	11,074	10,831	10,953	10,954	130,950	
COF	4733	4733	11533	11533	11533	11533	11533	11533	11533	11533	11533	11533	124,796	
NS	27,862	27,862	38,662	38,662	38,662	38,662	38,662	38,662	38,662	38,662	38,662	38,662	442,344	
QMG	34,475	34,475	48,875	48,875	48,875	48,875	48,875	48,875	48,875	48,875	48,875	48,875	557,700	
ADC	19,971	19,524	19,524	19,070	19,524	19,524	19,070	18,616	19,979	19,070	19,524	19,524	232,920	
Corp Acct	947	947	947	947	947	947	947	947	943	947	947	947	11,360	
Total Rev	\$ 949,728	\$ 897,562	\$ 888,155	\$ 880,451	\$ 873,044	\$ 897,742	\$ 871,654	\$ 858,463	\$ 897,985	\$ 880,695	\$ 876,659	\$ 790,282	\$ 10,562,414	

Statement of Financial Position

BLUE RIDGE COMMUNITY ACTION INC BALANCE SHEET	
FOR THE PERIODS ENDED DECEMBER 31, 2021	
	YEAR TO DATE ACTUAL
ASSETS	
CURRENT ASSETS	
CASH & EQUIVALENTS	2,283,961.71
ACCOUNTS RECEIVABLE	1,455,396.06
INVESTMENTS	8,740,029.86
PREPAID ITEMS	26,178.40
TOTAL CURRENT ASSETS	12,505,566.03
PROPERTY & EQUIPMENT	
FIXED ASSETS	8,013,166.28
LESS: ACCUMULATED DEPRECIATION	(4,290,943.42)
NET FIXED ASSETS BOOK VALUE	3,722,222.86
TOTAL ASSETS	16,227,788.89
LIABILITIES AND FUND BALANCE	
CURRENT LIABILITIES	
ACCOUNTS PAYABLE	237,260.40
ACCRUED SALARIES & P/R TAXES	166,668.34
CURRENT PORTION OF N/P	157,096.88
OTHER CURRENT LIABILITIES	273,160.45
DEFERRED REVENUE	308,882.27
TOTAL CURRENT LIABILITIES	1,143,068.34
LONG TERM LIABILITIES	
LONG TERM PORTION OF N/P	62,960.30
TOTAL LIABILITIES	1,206,028.64
FUND BALANCE	
PRIOR YEAR FUND BALANCE	14,855,619.32
FUND BALANCE-CURRENT YR INVEST	
TOTAL FUND BALANCE	14,855,619.32
CURRENT YEAR INCOME (LOSS)	166,140.93
TOTAL FUND BALANCE	15,021,760.25
TOTAL LIABILITIES & FUND BALANCE	16,227,788.89

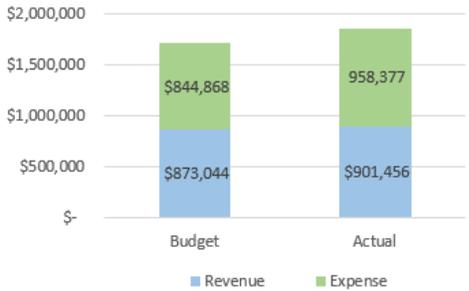
Financial Snapshot Revenue & Expenditure Report

BLUE RIDGE COMMUNITY ACTION INC. AS OF DECEMBER 31, 2021

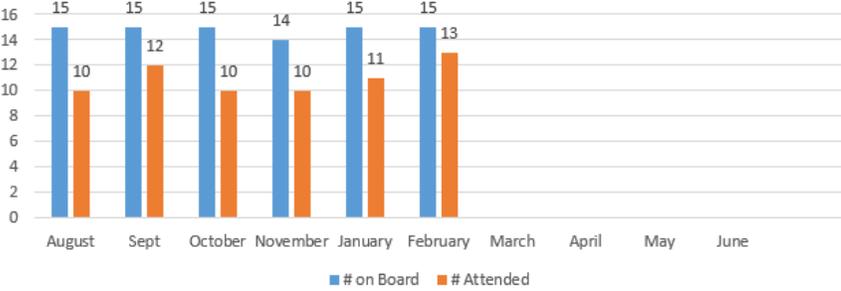
FINANCIAL SNAPSHOT

BALANCE SHEET	TO DATE
Cash & Equivalents	2,283,962
Other Current Assets	10,221,604
Net Fixed Assets	3,722,223
TOTAL ASSETS	16,227,789
Accounts Payable	237,260
Other Current Liabilities	905,808
Long Term Liabilities	62,960
TOTAL LIABILITIES	1,206,029
Fund Balance Prior Year	14,855,619
Current Year Income (Loss)	166,141
TOTAL FUND BALANCE	15,021,760
TOTAL LIABILITIES & FUND BAL	16,227,789

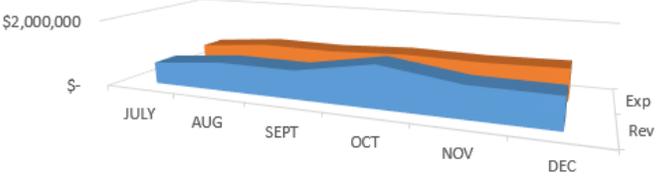
PROFIT & LOSS



BOARD ATTENDANCE

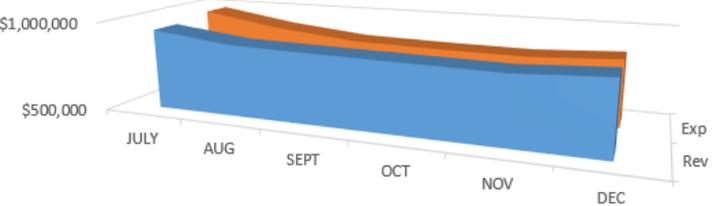


ACTUAL YTD



	JULY	AUG	SEPT	OCT	NOV	DEC
Rev	\$649,102	\$858,439	\$846,387	\$1,242,892	\$926,570	\$901,456
Exp	684,729	885,835	858,553	957,286	913,925	958,377

BUDGET YTD



	JULY	AUG	SEPT	OCT	NOV	DEC
Rev	\$949,728	\$897,562	\$888,155	\$880,451	\$873,044	\$897,742
Exp	978,447	906,090	859,474	849,490	844,868	869,066

Credit Card Report

BL ACCT 00008381-00000000
 BLUE RIDGE COMM ACTION
 Account Number: #### #### #### 1954
 Page 1 of 4



Account Summary

Billing Cycle		12/09/2019
Days In Billing Cycle		31
Previous Balance	\$	8,056.64
Purchases	+	5,191.43
Cash	+	0.00
Special	+	0.00
Credits	-	0.00
Payments	-	8,056.64 CR
Other Charges	+	0.00
Finance Charges	+	0.00
NEW BALANCE	\$	5,191.43

Credit Summary

Total Credit Line	\$	20,000.00
Available Credit Line		\$14,808.57
Available Cash		\$0.00
Amount Over Credit Line		0.00
Amount Past Due		0.00
Disputed Amount		0.00

Account Inquiries

-  Call us at: 1.800.397.1253
-  Go to www.BBT.com
-  Write us at PO BOX 698, WILSON, NC 27894-0698

Payment Summary

NEW BALANCE	\$5,191.43
MINIMUM PAYMENT	\$52.00
PAYMENT DUE DATE	01/03/2020

NOTE: Grace period to avoid a finance charge on purchases, pay entire new balance by payment due date. Finance charge accrues on cash advances until paid and will be billed on your next statement.

Corporate Activity

TOTAL CORPORATE ACTIVITY				8,056.64 CR
Trans Date	Post Date	Reference Number	Transaction Description	Amount
11/13	11/13	00023880903	BRANCH PAYMENT - THANK YO U	2,898.47 CR
12/02	12/02	00027195411	BRANCH PAYMENT - THANK YO U	5,158.17 CR

Rental Properties

Karen Harshman, Chief Financial Officer

Rental Properties

County	Number of Houses	Number of Apartments
Alexander County	2	0
Burke County	9	10
Caldwell County	16	8

Community Service Programs

An Overview of the Community Services, the Self Sufficiency Program, Circles, Home Delivered Meals, Congregate Nutritional, and Senior Community Service Employment Program (SCSEP)

Mary Wright, Community Economic Service Director

An Overview of the Community Services and the Self Sufficiency Program

- ❑ Community Services – Information and Referral component of the Community Services Block Grant supports BRCA’s centralized intake system. Centralized intake, assessment, eligibility, application and referral affords applicants one point of entry for BRCA and external application and referral. Follow Up is provided to assure families receive identified services.
- ❑ Self-Sufficiency Program component of the Community Service Block Grant provides intense case management to 40 low income families in Burke, Caldwell and Rutherford Counties to help families move above the poverty level. Direct services provided families include employment and educational support to promote self-sufficiency.

Overview of Circles and the Senior Community Service Employment Program

- ❑ Circles is a national initiative to empower low-income families to move out of poverty, to change perception and stereotypes which has evolved about people in poverty and to build pathways to self-sufficiency thru relationships and social capital. Program participants, Circle Leaders complete a 12 week training program at one of two locations in Burke County, Christ United Methodist Church and Burke United Christian Ministries.
- ❑ Senior Community Service Employment Program provides training opportunities to income eligible adults age 55 and older that want to return to work. Participants receive 20 hours of training per week at \$7.25 per hour. While on the program participants learn new skills or enhance skills that lead to unsubsidized employment. Participants receive training at non-profit and government agencies in Alexander, Burke, Caldwell, Cleveland, McDowell and Rutherford Counties. Senior Service of America is the funding source for this program. 97 participants will be served thru the 57 authorized slots.

An overview of Home Delivered Meals and Congregate Nutritional

- Home Delivered Meals program provides 1 lunch meal per day to seniors age 60 and over that are mentally or physically unable to obtain food or prepare meals and has no responsible person who is able and willing to perform that service. Volunteers deliver meals thru 7 designated routes Monday thru Friday in Caldwell County. The meal meets 1/3 Recommended Daily Allowance for adults. Funding for program services are made available thru the Home and Community Care Block Grant and the local Area Agency on Aging.
- Congregate Nutritional program provides lunchtime meal and related nutrition services to adults age 60 and over at 3 sites in Caldwell County. Nutrition Sites are located at MLK Community Center, Koinonia Apartments and Kings Creek Baptist Church. Nutrition sites are open Monday thru Friday from 9:00 am – 12 pm. Catered meals meet 1/3 Recommended Daily Allowance for adults. The funding source is the Home and Community Care Block grant and the local Area Agency on Aging.

Family and Child Development Programs

An overview of Head Start, Early Head Start, NC Pre-K, Child Day Care,
Adult Day Care and Foster Grandparents Program

Tina Kyes, Family and Child Development Director

Overview of Head Start and Early Head Start

- Head Start is a federally funded preschool program for children ages 3-5. Head Start provides educational opportunities for children, parent involvement opportunities, educational and health screenings and treatment, social services and limited emergency assistance, and nutritious meals and snacks. All staff have a two or four degree in Child Development. The current funded enrollment is 216 children in a 5 day/week center based program for 170 days/year. Head Start is offered at all sites. All BRCA centers are rated as 5 star.
- Early Head Start is a federally funded preschool program for pregnant women and children ages 0-3. Head Start provides educational opportunities for children, parent involvement opportunities, educational and health screenings and treatment, social services and limited emergency assistance, and nutritious meals and snacks. All staff have a two or four degree in Child Development. The current funded enrollment is 16 children in a 5 day/week center based program for 230 days/year. Early Head Start is offered at Quaker Meadows Generations and Northside.

Overview of NC Pre-K and Child Day Care

- ❑ NC Pre-K is a state-funded preschool program for children that will enter kindergarten the following Fall. The focus of the program is on school readiness. NCPK classrooms have an additional 30 minutes/day of instruction time and an extra 10 school days each year. Teachers have or are working towards a NC teaching license. Children in NCPK are dually-enrolled in Head Start. Current enrollment of dually-enrolled NCPK/HS children is 90. NCPK is offered at all BRCA sites.
- ❑ Child Day Care is a state funded (vouchers), private pay, or third party pay program for children ages 6 weeks – 5 years old that provides quality care 5 days/week for 250 days/year for working and student parents. The program provides educational opportunities for children, nutritious snacks and meals and school readiness. All BRCA sites have day care available before/after HS and EHS for families that need an extended-day program

Overview of Adult Day Care and the Foster Grandparents Program

- ❑ Adult Day Care is a day program for individuals over 18 that require supervision, socialization and limited medical care. Healthy meals and snacks are provided. A nurse is on-site to provide medical supervision. Funding is through state programs, the Veteran's Administration and private pay. The current enrollment is 20 participants in a center-based program at Quaker Meadows Generations.
- ❑ Foster Grandparents Program is a federally-funded program for income-eligible individuals over 55 that provides volunteer opportunities with children and special-needs adults in Burke, Caldwell, Alexander, Catawba and McDowell Counties. Participants work 10-30 hours a week and receive a stipend, mileage and meal reimbursement and training. There are currently 42 volunteers at 13 sites.

Energy Programs

An Overview of the Weatherization Assistance Program, Heating Appliance
Repair Replacement Program, and Duke Energy

Shawna Hanes, Energy Director

An overview of Weatherization Assistance Program and Heating Appliance Repair/Replacement Program

- ❑ Weatherization Assistance Program (WAP)
- ❑ The services of the Weatherization Assistance Program helps to reduce your energy costs by improving the energy efficiency of your home. In fact, these services reduce the average annual energy costs by \$300 per home.
- ❑ Through the Weatherization Assistance Program, trained technicians evaluate the needs of each home by conducting an energy audit. They suggest the energy efficiency methods that are the most appropriate and cost-effective for your home, making it warm in the winter, cool in the summer and safe all year long.
- ❑ When the energy audit is complete, a technician will meet with your family to explain how the work will be done. The technician will also inform you of ways you can conserve energy. Typical services include:
 - ❑ *Performing tune-ups and repairs to heating and cooling systems*
 - ❑ *Improving health and safety conditions by addressing carbon monoxide levels and combustion safety*
 - ❑ *Sealing major air leaks*
 - ❑ *Installing insulation in attics, walls, and floors*
 - ❑ *Sealing and insulating ducts*
 - ❑ *Installing energy efficient bulbs*
- ❑ Heating Appliance Repair/Replacement Program (HARRP)
- ❑ This program provides services for those persons with inadequate or no heating system or air conditioning. This program is associated with the Weatherization Assistance Program.
- ❑ THE ENERGY EFFICIENCY MEASURES INSTALLED AND THE IMPROVEMENTS MADE IN HEATING OR COOLING EQUIPMENT WILL PROVIDE SAVINGS IN ENERGY COSTS FOR 15 TO 20 YEARS.
- ❑ Typical HARRP services include:
 - ❑ *Performing tune-ups and repairs to heating and cooling systems*
 - ❑ *Installing new energy efficient heating systems*
 - ❑ *Removal of old inefficient heating systems*
 - ❑ *Installing a smart thermostat to regulate system*
 - ❑ *Sealing and insulating ducts*

An overview of the Duke Energy Program

- ▶ The Duke Energy Carolinas (DEC) Income-Qualified Weatherization Program helps reduce energy consumption for income-qualified customers by directly installing energy-efficient measures and providing education on energy efficiency.
- ▶ The goal of the program is to provide comprehensive weatherization/efficiency measures to the greatest number of customers in the Duke Energy Carolinas (DEC) service territory.
- ▶ Must be a Duke Energy customer to qualify for services.
- ▶ DEC program provides 2 tiers (based on energy usage) of reimbursement for measures installed in the home during the weatherization process.
 - ▶ Measures include but are not limited to air sealing, insulation, dryer vents, weather-stripping, heating system repair, heating system tune up, LEDs, aerators, refrigerators, etc.
- ▶ Heating system replacements can be funded by Duke's DEC Weatherization Program up to \$6000 if the following apply:
 - ▶ Household uses 7 (or more) kw/sqft of energy per year
 - ▶ System cannot be inoperable.
 - ▶ System must be able to turn on and efficiency determined through testing.
 - ▶ System must be an electric system.
 - ▶ There are no fuel switches.

Number of units completed by BRCA is based on a first come first serve basis. There was \$3.5 M dollars available to the Weatherization network in 2019.

Final Remarks

