

**BUDGET AND PRODUCTION PLANNING**

<b>Total Allocation</b>	\$ 51,942,185	
<b>T&amp;TA Allocation</b>	\$ 9,093,261	
<b>Total Administration</b>	\$ 7,791,328	
<b>Program Operations</b>	\$ 27,441,388	
<b>Health and Safety</b>	\$ 4,116,208	H&S Percentage: 15%
<b>Vehicles &amp; Equipment</b>	\$ 3,000,000	
<b>Other (audits, insurance, etc.)</b>	\$ 500,000	
<b>Total Budget Check</b>	\$ 51,942,185	
<b>ACPU Total</b>	\$ 8,008.78	

Quarterly Performance Period	PRODUCTION Number of Planned Units	BUDGET	
		Planned Program Operations Budget (units * ACPU - vehicles)	Planned H&S Budget
Q1 (tentative start Sept 1, 2022)	0	\$ -	\$ -
Q2	75	\$ 541,463.85	\$ 81,219.57
Q3	104	\$ 750,829.88	\$ 112,624.48
Q4	125	\$ 902,439.75	\$ 135,365.96
Year 1 Subtotal	304	\$ 2,194,733.48	\$ 329,210.01
Q1	125	\$ 902,439.75	\$ 135,365.96
Q2	150	\$ 1,082,927.70	\$ 162,439.15
Q3	150	\$ 1,082,927.70	\$ 162,439.15
Q4	221	\$ 1,595,513.49	\$ 239,327.01
Year 2 Subtotal	646	\$ 4,663,808.65	\$ 699,571.26
Q1	221	\$ 1,595,513.49	\$ 239,327.01
Q2	300	\$ 2,165,855.41	\$ 324,878.30
Q3	350	\$ 2,526,831.31	\$ 379,024.68
Q4	155	\$ 1,119,025.29	\$ 167,853.79
Year 3 Subtotal	1026	\$ 7,407,225.50	\$ 1,111,083.77
Q1	175	\$ 1,263,415.66	\$ 189,512.34
Q2	300	\$ 2,165,855.41	\$ 324,878.30
Q3	350	\$ 2,526,831.31	\$ 379,024.68
Q4	239	\$ 1,725,464.81	\$ 258,819.71
Year 4 Subtotal	1064	\$ 7,681,567.19	\$ 1,152,235.02
Q1	200	\$ 1,443,903.61	\$ 216,585.53
Q2	250	\$ 1,804,879.51	\$ 270,731.91
Q3	200	\$ 1,443,903.61	\$ 216,585.53
Q4	111	\$ 801,366.50	\$ 120,204.97
Year 5 Subtotal	761	\$ 5,494,053.22	\$ 824,107.94
<b>TOTAL</b>	<b>3,801</b>	<b>\$ 27,441,388.04</b>	<b>\$ 4,116,208.00</b>
30% of Total	1,140		

**# OF PLANNED MONITORING VISITS**

<b>Program, Admin and Fiscal Visits</b>	<b>Quality Control Inspections</b>	<b>In-Progress Inspections</b>
4	0	
4	8	
4	10	
8	13	
20	30.4	0
4	13	
4	15	
4	15	
8	22	
20	64.6	0
4	22	
4	30	
4	35	
8	16	
20	102.6	0
4	18	
4	30	
4	35	
8	24	
20	106.4	0
4	20	
4	25	
4	20	
8	11	
20	76	0
100	380	0

**WORKFORCE PLANNING**

Grantee Workforce	CURRENT:		PLANNED:	
	Staff	Contractors	Staff	Contractors
Program Manager/Director	1		1	
Policy Analyst/Coordinator	2		3	
QA Monitor - Technical	2		3	2
QA Monitor - Admin/Fiscal		1	1	1
Support	1		2	
Other - Trainers	2		3	
Other - Training Center Manager	1		1	
<b>Total</b>	<b>9</b>	<b>1</b>	<b>14</b>	<b>3</b>

	CURRENT:	PLANNED:
<b>Total Number of Subgrantees:</b>	20	20

Subgrantee Workforce	CURRENT:		PLANNED:	
	Staff	Contractors	Staff	Contractors
RITs and Crew Leads	38	27	91	75
Energy Auditors	20	3	32	4
Quality Control Inspectors	19	3	32	4
Trade Professionals (HVAC, electric, etc.)	10	30	13	51
Program Managers/Directors	15	1	16	1
WAP Support/Admin	18		30	0
Other - DNE	4		4	0
Other -				
<b>Total</b>	<b>124</b>	<b>64</b>	<b>218</b>	<b>135</b>

<b>Please provide responses to the following:</b>	<b>Response:</b>
1) What is your current average timeframe for hiring and onboarding new Grantee staff?	6 weeks
2) What are your primary challenges in the Grantee hiring and onboarding process?	Finding qualified individuals to interview
3) Do you anticipate receiving support from other program staff at the Grantee level? If yes, what role will shared staff fill?	All staff will be shared between BIL and regular DOE Formu
4) If you plan to add contractors at the Grantee level, what is your goal for executing contract(s)? Please provide dates.	06/30/23
5) Do you anticipate Subgrantees will shift from	

crew-based to contractor-based models, or vice-versa? Please explain.	No. I think they will remain the same, which is a split between recruit.
6) Provide any additional comments on your plans for ramping up workforce.	This will take longer than we currently anticipate. However, year universities to recruit.

214500                      95000                      309500 Crew Incentive Program

Multiple subs use the same contractor.

75% reporting

189000                      142000                      331000 Contractor Incentive

la. They will continue in current roles, just serving both grants.

men crew and contractor. Contractors like crew members are very difficult to

, we are trying to partner with community and technical colleges as well as 4-

## TRAINING AND TECHNICAL ASSISTANCE PLANNING

Total Allocation:	\$ 9,093,261
Comprehensive Training	\$ 1,192,390
Specific Training	\$ 604,240
Client Education	\$ 1,000,000
Grantee Monitoring	\$ 1,250,000
Program Evaluation/IT	\$ 500,000
Other - Subgrantees	\$ 4,546,631
T&TA Budget Check	\$ 9,093,261

PLANNING			
(C)	Training Category	Comprehensive or Specific Training?	Planned Year and Quarter
<i>"Example" QCI Training - Include HEP Occupation if applicable</i>	<i>Technical, Administrative/Programmatic, Fiscal</i>	<i>Comprehensive, Specific</i>	<i>PY 2023 Q1</i>
Dwelling Needs Evaluator (DNE)	Technical	Comprehensive	<b>PY 2023</b> - 1 course each Quarter; <b>PY2024</b> - Q1, Q3, Q4 - 1 course each Quarter, Q2 - 2 courses; <b>PY2025</b> - Q2, Q3, Q4 - 1 course each Quarter, Q1 - 2 courses; <b>PY2026</b> - 1 course each Quarter; <b>PY2027</b> - 1 course each Quarter
Combustion Appliance Zone (CAZ)	Technical	Specific	<b>PY 2023</b> - 3 courses each Quarter; <b>PY2024</b> - 3 courses each Quarter; <b>PY2025</b> - 3 courses each Quarter; <b>PY2026</b> - 3 courses each Quarter; <b>PY2027</b> - 3 courses each Quarter

Energy Auditor (EA)	Technical	Comprehensive	<b>PY 2023</b> - 1 course each Quarter; <b>PY2024</b> - Q1, Q2, Q4 - 1 course each Quarter, Q3 - 2 courses; <b>PY2025</b> - Q1, Q3, Q4 - 1 course each Quarter, Q1 - 2 courses; <b>PY2026</b> - 1 course each Quarter <b>PY2027</b> - 1 course each Quarter
ASHRAE 62.2 2016	Technical	Specific	<b>This course is available Online 365 days per year</b> <b>PY 2023</b> - 7 courses each Quarter; <b>PY2024</b> - 9 courses each Quarter; <b>PY2025</b> - 9 courses each Quarter; <b>PY2026</b> - 6 courses each Quarter; <b>PY2027</b> - 6 courses each Quarter
Crew Leader	Technical	Comprehensive	<b>PY 2023</b> - 1 course each Quarter; <b>PY2024</b> - Q2, Q3, Q4 - 1 course each Quarter, Q1 - 2 courses; <b>PY2025</b> - Q1, Q2, Q3 - 1 course each Quarter, Q4 - 2 courses; <b>PY2026</b> - 1 course each Quarter; <b>PY2027</b> - 1 course each Quarter
Intro to Weatherization	Technical	Specific	<b>This course is available Online 365 days per year</b> <b>PY 2023</b> - 8 courses each Quarter; <b>PY2024</b> - 10 courses each Quarter; <b>PY2025</b> - 12 courses each Quarter; <b>PY2026</b> - 8 courses each Quarter; <b>PY2027</b> - 8 courses each Quarter

Leaks, Envelope & Ducts (LED)	Technical	Specific	<b>PY 2023</b> - 3 courses each Quarter; <b>PY2024</b> - 3 courses each Quarter; <b>PY2025</b> - 3 courses each Quarter; <b>PY2026</b> - 3 courses each Quarter; <b>PY2027</b> - 3 courses each Quarter
NEAT/MHEA	Technical	Specific	<b>PY 2023</b> - 1 course each Quarter; <b>PY2024</b> - Q1, Q2, Q4 - 1 course each Quarter, Q3 - 2 courses; <b>PY2025</b> - Q1, Q3, Q4 - 1 course each Quarter, Q1 - 2 courses; <b>PY2026</b> - 1 course each Quarter <b>PY2027</b> - 1 course each Quarter
Quality Control Inspector (QCI)	Technical	Comprehensive	<b>PY 2023</b> - Q2 and Q4 - 1 course each Quarter; <b>PY2024</b> - Q2 and Q4 - 1 course each Quarter; <b>PY2025</b> - Q1, Q2, Q3 - 1 course each Quarter; <b>PY2026</b> - Q2 and Q4 - 1 course each Quarter; <b>PY2027</b> - Q3 1 course
Retrofit Installer Technician (RIT)	Technical	Comprehensive	<b>PY 2023</b> - 2 courses each Quarter; <b>PY2024</b> - 3 courses each Quarter; <b>PY2025</b> - 3 courses each Quarter; <b>PY2026</b> - 2 courses each Quarter; <b>PY2027</b> - 1 course each Quarter





		REPORTING		
Training Center/Provider	Estimated Costs	Grantee/Subgrantee/ Contractor Participating in Training	Total Number of Participants	Actual Costs
<i>Weatherization Academy (IREC accredited)</i>	\$8,000.00	<i>ABLE Agency (4) Can Do CAA (3)</i>	7	\$5,427.00
REE	\$211,735			
REE	\$59,000			

REE	\$200,995			
REE	\$75,000			
REE	\$185,000			
REE	\$37,000			

REE	\$88,200			
REE	\$90,000			
REE	\$45,900			
REE	\$539,000			



Remarks/Comments
<i>Contract with trainer approved 7/9/17. All QCI get opportunity for this comprehensive course every 5 years.</i>

**MONITORING PLANNING**

**Monitoring Schedule**

<b>Subgrantee</b>	<b>Monitoring Visit #</b>	<b>Level of Review</b>
<i>"Example" - Subgrantee Name</i>	1	<i>Initial/Follow-up</i>
Audubon Area Community Services, Inc	17	<i>Initial/Follow-up</i>
Bell-Whitley Community Action Agency, Inc.	5	<i>Initial/Follow-up</i>
Big Sandy Area Community Action Program, Inc.	16	<i>Initial/Follow-up</i>
Blue Grass Community Action Agency, Inc.	6	<i>Initial/Follow-up</i>
CAC Lexington	7	<i>Initial/Follow-up</i>
Central Kentucky Community Action Council, Inc.	15	<i>Initial/Follow-up</i>
Daniel Boone Development Council, Inc.	14	<i>Initial/Follow-up</i>

Foothills - KY River Foothills	10	<i>Initial/Follow-up</i>
Gateway Community Services Organization, Inc.	4	<i>Initial/Follow-up</i>
KCEOC Harlan	18	<i>Initial/Follow-up</i>
KCEOC Community Action Partnership	18	<i>Initial/Follow-up</i>
Lake Cumberland Community Services Organization	2	<i>Initial/Follow-up</i>
Licking Valley Community Action Program, Inc.	13	<i>Initial/Follow-up</i>
LKLP	1	<i>Initial/Follow-up</i>
Louisville - Multi-Purpose	8	<i>Initial/Follow-up</i>
TBD	12	<i>Initial/Follow-up</i>

Multi-Purpose Community Action Agency, Inc.	8	<i>Initial/Follow-up</i>
North East Kentucky Community Action Commission, Inc.	9	<i>Initial/Follow-up</i>
Northern Kentucky Community Action Commission, Inc.	11	<i>Initial/Follow-up</i>
Pennyrile Allied Community Services, Inc.	19	<i>Initial/Follow-up</i>
KCOEC Barren River	18	<i>Initial/Follow-up</i>
Tri-County Community Action Agency, Inc.	20	<i>Initial/Follow-up</i>
West Kentucky Allied Services, Inc.	3	<i>Initial/Follow-up</i>
<b>Monitoring Staff</b>		

<b>Title</b>	<b>Credentials</b>	<b>Type of Monitor</b>
<i>"Example" - Occupation Title</i>	<i>RIT/CL/EA/QCI/ Other</i>	<i>Technical Monitor/Administra tive Monitor</i>
<b>Johnny Luckenbil</b>	RIT/EA/DNE/QCI	Technical Monitor
<b>Jason Reneau</b>	RIT/EA	Technical Monitor
<b>Troy Gosser</b>	RIT/EA/DNE/QCI	Technical Monitor
<b>Dewayne Cade</b>	RIT/EA/DNE/QCI	Technical Monitor

<b>Monitoring Type</b>	<b>Review Type</b>	<b>Target Quarter</b>	<b># of Units Planned for Completion</b>
<i>Virtual/Onsite</i>	<i>Technical/Program/Admi n/Financial</i>	<i>Q2</i>	<i>30</i>
<i>Onsite</i>	<i>Technical/Program/Admi n/Financial</i>	<i>PY23 -Q4 PY24 - Q4 PY25 - Q4 PY26 - Q4 PY27 - Q4</i>	<i>193</i>
<i>Onsite</i>	<i>Technical/Program/Admi n/Financial</i>	<i>PY23 -Q2 PY24 - Q2 PY25 - Q2 PY26 - Q2 PY27 - Q2</i>	<i>134</i>
<i>Onsite</i>	<i>Technical/Program/Admi n/Financial</i>	<i>PY23 -Q4 PY24 - Q4 PY25 - Q4 PY26 - Q4 PY27 - Q4</i>	<i>147</i>
<i>Onsite</i>	<i>Technical/Program/Admi n/Financial</i>	<i>PY23 -Q2 PY24 - Q2 PY25 - Q2 PY26 - Q2 PY27 - Q2</i>	<i>207</i>
<i>Onsite</i>	<i>Technical/Program/Admi n/Financial</i>	<i>PY23 -Q2 PY24 - Q2 PY25 - Q2 PY26 - Q2 PY27 - Q2</i>	<i>201</i>
<i>Onsite</i>	<i>Technical/Program/Admi n/Financial</i>	<i>PY23 -Q4 PY24 - Q4 PY25 - Q4 PY26 - Q4 PY27 - Q4</i>	<i>232</i>
<i>Onsite</i>	<i>Technical/Program/Admi n/Financial</i>	<i>PY23 -Q4 PY24 - Q4 PY25 - Q4 PY26 - Q4 PY27 - Q4</i>	<i>180</i>

Onsite	Technical/Program/Admi n/Financial	PY23 -Q3 PY24 - Q3 PY25 - Q3 PY26 - Q3 PY27 - Q3	167
Onsite	Technical/Program/Admi n/Financial	PY23 -Q1 PY24 - Q1 PY25 - Q1 PY26 - Q1 PY27 - Q1	154
Onsite	Technical/Program/Admi n/Financial	PY23 -Q4 PY24 - Q4 PY25 - Q4 PY26 - Q4 PY27 - Q4	96
Onsite	Technical/Program/Admi n/Financial	PY23 -Q4 PY24 - Q4 PY25 - Q4 PY26 - Q4 PY27 - Q4	128
Onsite	Technical/Program/Admi n/Financial	PY23 -Q1 PY24 - Q1 PY25 - Q1 PY26 - Q1 PY27 - Q1	155
Onsite	Technical/Program/Admi n/Financial	PY23 -Q4 PY24 - Q4 PY25 - Q4 PY26 - Q4 PY27 - Q4	121
Onsite	Technical/Program/Admi n/Financial	PY23 -Q1 PY24 - Q1 PY25 - Q1 PY26 - Q1 PY27 - Q1	187
Onsite	Technical/Program/Admi n/Financial	PY23 -Q2 PY24 - Q2 PY25 - Q2 PY26 - Q2 PY27 - Q2	220
Onsite	Technical/Program/Admi n/Financial	PY23 -Q3 PY24 - Q3 PY25 - Q3 PY26 - Q3 PY27 - Q3	89

Onsite	Technical/Program/Admi n/Financial	PY23 -Q2 PY24 - Q2 PY25 - Q2 PY26 - Q2 PY27 - Q2	122
Onsite	Technical/Program/Admi n/Financial	PY23 -Q3 PY24 - Q3 PY25 - Q3 PY26 - Q3 PY27 - Q3	213
Onsite	Technical/Program/Admi n/Financial	PY23 -Q3 PY24 - Q3 PY25 - Q3 PY26 - Q3 PY27 - Q3	187
Onsite	Technical/Program/Admi n/Financial	PY23 -Q4 PY24 - Q4 PY25 - Q4 PY26 - Q4 PY27 - Q4	160
Onsite	Technical/Program/Admi n/Financial	PY23 -Q4 PY24 - Q4 PY25 - Q4 PY26 - Q4 PY27 - Q4	225
Onsite	Technical/Program/Admi n/Financial	PY23 -Q4 PY24 - Q4 PY25 - Q4 PY26 - Q4 PY27 - Q4	83
Onsite	Technical/Program/Admi n/Financial	PY23 -Q1 PY24 - Q1 PY25 - Q1 PY26 - Q1 PY27 - Q1	200

<b>Funding Source</b>	<b>Staff/Contractor</b>
<i>%TTA/%Admin</i>	<i>Staff/Contractor</i>
100% TTA	Staff
100% TTA	Staff
100% TTA	Staff
100% TTA	Staff

<b>Minimum % of QCI</b>	<b># of QCI Reviews</b>
5%	1.5
10%	19.3
10%	13.4
10%	14.7
10%	20.7
10%	20.1
10%	23.2
10%	18

10%	16.7
10%	15.4
10%	9.6
10%	12.8
10%	15.5
10%	12.1
10%	18.7
10%	22
10%	8.9

10%	12.2
10%	21.3
10%	18.7
10%	16
10%	22.5
10%	8.3
10%	20

## MILESTONE PLANNING

<b>T&amp;TA</b>	<b>Start Date</b>	<b>End Date Goal</b>
<b>Complete training needs assessment</b>	1/31/2022	4/30/2022
<b>Release RFP</b>		
<b>Execute contract</b>		
<b>Develop training plans</b>	5/1/2022	12/31/2024
<b>Deliver comprehensive training to new hires</b>	7/1/2023	6/30/2027

<b>GRANTEE PROCUREMENT</b>	<b>Start Date</b>	<b>End Date Goal</b>
<i>Add Subgrantees/Modify Service Territories</i>	7/1/2025	12/30/2025
<i>Execute Subgrantee contracts</i>	10/1/2022	12/31/2022
<i>Release RFPs (T&amp;TA, QCI, IT, etc.)</i>		
<i>Execute contracts</i>		
<i>Other:</i>		

<b>GRANTEE STAFFING</b>	<b>Start Date</b>	<b>End Date Goal</b>
<i>Hire financial staff person</i>	4/1/2023	6/30/2023
<i>Hire QCI Monitors</i>	4/1/2023	6/30/2023
<i>Other:</i>		

<b>SUBGRANTEE NETWORK</b>	<b>Start Date</b>	<b>End Date Goal</b>
<i>Hiring of new staff</i>	4/1/2023	6/30/2023
<i>Procure contractors</i>	4/1/2023	12/31/2023
<i>Procure vehicles and equipment</i>	7/1/2023	12/31/2023
<i>Other:</i>		

<b>SYSTEMS/INFORMATION MANAGEMENT</b>	<b>Start Date</b>	<b>End Date Goal</b>
<i>Update WAP reporting systems</i>		
<i>Other:</i>		

<b>PRODUCTION</b>	<b>Start Date</b>	<b>End Date Goal</b>
<i>30% of total estimated units weatherized</i>	7/1/2024	12/31/2024
<i>Other:</i>		

<b>PLANNING</b>
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**Comments**

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Types of training needed by network

NA

NA

Training shouldn't be different than currently required trainings to the network.

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**Comments**

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Will do an open application for additional non-profits in territories if 30% of jobs are not completed by year 2 (285 completed).

For current subgrantees

All inhouse currently

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**Comments**

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**Comments**

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ongoing throughout terms of grant

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**Comments**

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Migrated to Hancock 7/1/2021 - Enhancements are ongoing

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**Comments**

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will need to increase application intake as well as staffing to reach this goal

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**Actual Start Date      Actual End Date Goal**

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**Actual Start Date      Actual End Date Goal**

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**Actual Start Date      Actual End Date Goal**

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**Actual Start Date      Actual End Date Goal**

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**Actual Start Date      Actual End Date Goal**

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**Actual Start Date      Actual End Date Goal**

<b>REPORTING</b>
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**Comments**

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**Comments**

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**Comments**

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**Comments**

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**Comments**

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**Comments**

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## SPECIAL PROJECTS

<b>Project Title:</b>	<b>Category:</b>	<b>Organizations/Partners/People Involved:</b>
<i>New Database Procurement</i>	<i>Technology</i>	<i>WAP Manager, Subgrantees, procurement officer, vendors</i>
Online WX application	Technology	Grantee/Subgrantee/Applicants/Vendor
Electronic signatures	Technology	Grantee/Subgrantee/Applicants/Vendor
API from NEAT/MHEA to Hanco	Technology	Grantee/Subgrantee/Applicants/Vendor
Furnish iPads or tablets for subgrantee QCI and KHC QCI	Technology	Grantee/Subgrantee/Applicants/Vendor
Outreach Team	Administrative	Grantee
Weatherization Career Path	Administrative	Subgrantee

Contractor Incentives

Administrative Grantee/Subgrantee

Solar energy

Administrative/T Subgrantee

PLANNING
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<b>Resources:</b>	<b>Funding Type:</b>	<b>Estimated Cost:</b>	<b>Start Date:</b>	<b>End Date:</b>
	<i>T&amp;TA, Admin</i>	<i>\$127,000</i>	<i>5/1/2022</i>	<i>5/1/2023</i>
	Admin	\$16,000	1/1/2023	6/30/2023
	Admin	\$8,000	7/1/2023	9/30/2023
	T&TA, Admin	\$8,000	1/1/2023	6/30/2023
	Admin	\$23,000.00	7/1/2023	9/30/2023
	Admin	\$1,000,000	7/1/2023	9/30/2023
	Admin	\$309,500	1/1/2023	6/30/2027

Program Support      \$ 331,000.00      7/1/2023 6/30/2027

USDA 504 Loans, LIHEAP      Program Operations/T&TA      \$250,000      4/1/2023 6/30/2027

**Notes:**

*Need planning meeting with subgrantees and to talk with the procurement department.*

Add an online application to automate Hancock software client intake

Add a feature to do electronic signatures in the current application process and QCI forms

Automate the measures lists and prices from new web-based NEAT/MHEA

To help with web-based NEAT/MHEA and automation

To hire a team of outreach workers (3 years) to serve each region of the state to act as an applicant gatekeeper. To attend community events to promote WX and assist with applications. To act as a weatherization navigator to answer applicant questions, assist in collecting supporting documentation. To communicate eligibility and next steps to potential clients. (Price based on 5-year period.)

- Set minimum wage for retrofit installer, crew lead, EA, and QCI
- Provide incentive ladder for obtaining EA and QCI
- Sign-on bonuses for new crew (RIT, crew lead, EA, and QCI) = \$250
- Provide 12-month and 2-year retention bonus (\$500 and \$750)
- Five-year retention bonus - \$1,250

**Actual Cost:****Actual Start:****Actual End:**

To provide 1-year, 3-year, and 5-year retention bonuses to all contractors (new and old): 1-year = \$500; 3 year = \$1000 and 5 year = \$1500.

Grandfather in current contractors, based on their years.

Pilot 1 - 2 homes with KCEOC and HOMES (non-profit solar installer).

Max 7 homes per year of BIL funding at \$25,000 per home. Partner with LIHEAP and USDA 504 loan program.

Homes not eligible will be over 50 years old, historic properties or roofs that should be replaced unless we can use the 504 loan to replace.

(included training costs in estimate)

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**Notes/Lessons Learned:**