

**MICHIGAN DEPARTMENT OF HUMAN SERVICES
BUREAU OF COMMUNITY ACTION AND ECONOMIC OPPORTUNITY
TECHNICAL WEATHERIZATION DIVISION**



**BCAEO TECHNICAL Wx DIVISION MONITORING GUIDE FOR:
WEATHERIZATION ASSISTANCE PROGRAM
PROGRAM YEAR 2005-2006**

LWO: _____
DATE: _____
MONITOR: James W. Smith

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OVERVIEW AND SCOPE OF MONITORING

This monitoring guide was developed for use by the Michigan Department of Human Services, Bureau of Community Action and Economic Opportunity, Technical Weatherization Division for monitoring each community action agency (CAA)/local weatherization operator (LWO) receiving federal Department of Energy (DOE) Weatherization Assistance Program (WAP), Department of Health and Human Services (HHS) Low Income Home Energy Assistance Program (LIHEAP), and/or Michigan Public Services Commission (MPSC) funds through the Michigan Department of Human Services, Bureau of Community Action and Economic Opportunity (BCAEO). The review will be conducted to determine whether the CAA/LWO is complying with federal regulations, state guidelines including the Weatherization Field Manual (WFM) and the Community Services Policy Manual (CSPM), and various contract obligations.

The monitoring visit will be conducted in two visits (two to three days each) this programmatic year and will include a review of previous findings and required corrective actions, client education, materials standards and specifications, work specifications, job compliance, quality control procedures, training compliance, DOE National Energy Audit (NEAT), and/or other approved BCAEO/DOE approved energy audits. Training and/or technical assistance will be provided during the visit.

Directions on monitoring, along with citations relative to specific requirements, are contained within each subject area.

Note: References in this guide to the Weatherization Field Manual (WFM) will cite Chapter, Section and Subject (i.e. WFM I.I.A.1). Specific references to the Community Services Policy Manual (CSPM) will cite the CSPM, and number (i.e. CSPM 610.1).

The Technical Weatherization Specialist will schedule entrance and exit interviews with the CAA/LWO director or their designee. **Any required corrective action will be discussed at the "Exit Conference" with the CAA/LWO director and/or their designee.**

A monitoring "Finding FAX" report containing minor findings identified during the monitoring will be forwarded to the CAA/LWO Weatherization office for corrective action within 15 working days of the visit, the CAA/LWO is to respond with the corrective action taken within an additional 15 working days after which a written report will be forwarded to the CAA/LWO with the corrections in-place. However, if major findings are identified (i.e., could possibly result in the loss of CAA/LWO monies) a written report including the finding and required corrective action and/or resolution will be sent to the CAA/LWO director approximately 7 working days after the receipt of the minor "Finding FAX" corrective action and/or 30 working days from the monitoring visit if no minor findings. If major findings are included in the report letter to the CAA/LWO, a corrective action response will be required within 15 working days.

ENTRANCE INTERVIEW

LWO: _____

A. Date: _____

B. Persons in Attendance:

CAA/LWO Staff:

<u>Name</u>	<u>Title</u>
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

MDHS/BCAEO Staff:

<u>Name</u>	<u>Title</u>
James W. Smith	Technical Weatherization Specialist
_____	_____
_____	_____

Others (Identify Organization):

<u>Name</u>	<u>Title</u>
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

C. Review of the Following:

1. Purpose of the monitoring visit.
2. Areas to be monitored.
3. CAA's/LWO's responsibilities (i.e., staff introductions, providing access to records, schedule staff interviews, schedule site visits).
4. Time frames.
5. Schedule exit conference (tentative).

D. Comments (if necessary): _____

EXIT INTERVIEW

LWO: _____

A. Date: _____

B. Persons in Attendance:

CAA/LWO Staff:

<u>Name</u>	<u>Title</u>
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

MDHS/BCAEO Staff:

<u>Name</u>	<u>Title</u>
James W. Smith	Technical Weatherization Specialist
_____	_____
_____	_____

Others (Identify Organization):

<u>Name</u>	<u>Title</u>
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

C. Summary of Review Findings Discussed:

D. Comments: _____

Agency: _____

Date: _____

I. PREVIOUS FINDINGS

Review the PY 2004/2005 monitoring file for unresolved findings, or findings which required resolution through procedural changes. Identify the findings below, review the actions or procedural changes, and determine if the changes have effectively corrected the finding.

Finding:

Corrective Action Response to FIA from Agency:

Corrective Action Implemented (Based on review during this monitoring visit):

Yes _____ No _____

Has the corrective action taken been effective in resolving the finding?

Yes _____ No _____

If No, describe the additional corrective action required:

Finding:

Corrective Action Response to FIA from Agency:

Corrective Action Implemented (Based on review during this monitoring visit):

Yes _____ No _____

Has the corrective action taken been effective in resolving the finding?

Yes _____ No _____

If No, describe the additional corrective action required:

II. CLIENT EDUCATION**A. Background and Scope**

DOE 10 CFR Part 440.23 includes provisions for oversight, training, and technical assistance concerning conservation practices for occupants of eligible dwelling units.

The monitoring will include a review of the agency's client files and client interviews to determine compliance with the Community Services Policy Manual (CSPM) and the Weatherization Field Manual (WFM) requirements as referenced below.

B. CSPM & WFM Chapters/Sections Referenced in This Section

CSPM 311-05	MPSC Client Education
CSPM 612.4	Client Energy Education Policy
WFM III.II.A.2	Client Plan of Action

C. Desk Review

As a part of the review of sampled client/job files from Section IV.D - Work Specifications, of this guide, files will be reviewed relative to the documentation of client education in reference to DOE/LIHEAP/MPSC requirements. The Client/Job File Check List (Appendix A, item II.C) should be completed relative to compliance with client education requirements.

NOTE: In all cases where MPSC monies are used for client education in conjunction with Weatherization Assistance the "Agency MPSC Client Education Plan" is to be garnered from the CAA/LWO, attached to this "Monitoring Guide" and the file reviewed including a job site client interview for compliance.

An overall evaluation of compliance (satisfactory or unsatisfactory) should be entered for items 1 and 2 of Appendix A - II.C, along with appropriate comments relative to the following:

1. Was a Client Plan of Action found in each client/job file reviewed and if so were three energy action steps agreed upon?
2. For files which did not contain a Client Plan of Action was acceptable documentation provided to explain why?
3. Was the agency MPSC plan followed and the client aware of the goal and effort of the specified training.

D. Field Review

As a part of the monitoring guide Section V - Job Site Visits, client education and explanations of work completed as provided by the CAA/LWO will be discussed with the client and evaluated (satisfactory or unsatisfactory) in Appendix B, of this document, item II.F).

E. Client Interview(s)

Client interviews will be conducted during at least one of the job site visits. The following form will be completed for each client interview conducted.

Agency: _____
Date: _____

Name of client interviewed: _____ Job # _____

1. Client Education—Client education is to be provided in accordance with CSPM 612.4, Page 6 A preinspection process is completed with client involvement. The weatherization work is completed by the CAA/LWO with an opportunity to reinforce the client's energy action steps.

Ask client the following questions and note responses relative to client education issues:

a. Were you informed of work to be completed? Yes: ___ No: ___
Comments: _____

b. Were energy savings discussed with you? Yes: ___ No: ___
Comments: _____

c. Who provided client education to you? _____

d. What energy action steps did you agree to (contract in file)?
Yes: ___ No: ___ Comments: _____

e. What results have you seen as a result of these activities? _____

2. Discuss and note client comments relative to the following issues:

a. How did you learn about the program (note specifics if the education was a part of agency MPSC project)? Comments: _____

b. Are you satisfied with the weatherization work?
Yes: ___ No: ___ Comments: _____

c. If you are not satisfied with the work, what are your concerns/expectations? Comments: _____

d. Do you have any comments as to how the program can be improved?
Comments: _____

Agency: _____

Date: _____

III. MATERIAL STANDARDS/SPECIFICATIONS

A. Background

All weatherization materials utilized in conjunction with work performed as a part of the weatherization program shall, at a minimum, meet the "standards for weatherization materials" contained in "Appendix A" of the current DOE rules, and the Weatherization Field Manual (WFM III.III).

Compliance with DOE (Appendix A) and MDHS/BCAEO product standards is monitored to ensure usage of proper materials. Pursuant to the guidelines, the CAA/LWO is required to maintain documentation of compliance of materials used with required product standards and testing requirements. Written procedures are required relative to building insulation products and testing data is required to be maintained for cellulose insulation (see WFM III.III.A.2).

B. Scope

The review will be conducted to determine whether the CAA/LWO has met material product standards in compliance with the DOE regulations and MDHS/BCAEO requirements. The review will include a sampling of warehoused (if applicable) materials and materials utilized at specific job sites (reviewed during Section V - Job Site Visits).

C. WFM Chapters/Sections/Subjects Referenced in This Section:

II.I.A Policy Guidance on the Purchase of Building Insulation Products
II.I.A General Measures Policies (minimum 10 year life)
II.I.C.1 Interior Exposed Insulation (flame spread not to exceed 150)
II.I.C.2 Attic Ventilators, must be screened (pg. 2)
II.I.C.4 Boiler Pipe Insulation
II.I.C.4 Duct/Pipe Insulation
II.I.C.5 6 mil Ground Cover
II.I.C.7 Foundation Ventilators, must be screened
II.I.C.13 Dryer Vents (pg. 12)
II.I.E.1 Low Flow Shower Head Maximum Flow Rate of 2 ½ g.p.m.
II.I.E.2 Water Heater Insulation
II.I.E.3 Clock Thermostat
III.III.A.1 Minimum Standards For Wx Materials, Appendix A
III.III.A.2 Certificate of Insulation (pg. 1)
III.III.A.2 Cellulose Testing/Labeling Requirements (pg. 2)
III.III.A.2 Approved Cellulose Manufacturers (pg. 3)
III.III.A.3 Weatherization Materials Documentation Requirements

D. Desk Review

The areas reviewed in this section relate to the following WFM requirements:

- All weatherization materials utilized in conjunction with work performed as a part of this program shall, at a minimum, meet the Standards for Weatherization Materials contained in Appendix A, as published in the current DOE/WAP rules and in the WFM III.III.A.1.

Agency: _____

Date: _____

- WFM III.III.B requires CAAs/LWOs to maintain documentation on weatherization materials to establish compliance with standards and testing requirements.
- WFM III.III.A.2 requires CAAs/LWOs to maintain documentation on cellulose insulation testing data on all manufacturers' products to ensure the requirements of the current standards for loose-fill cellulose insulation from DOE Appendix A and testing/labeling required by the WFM III.III.A.2, are met.

Note: If the CAA/LWO and/or contractor is utilizing cellulose insulation as approved in WFM III.III.A.2 pg. 3, no testing documentation is required to be maintained. However, it is recommended that contractors indicate in writing the manufacturer/brand of cellulose they plan on using.

Weatherization materials documentation will be reviewed as follows:

1. Review documentation maintained at the CAA/LWO offices relative to weatherization materials being used. Is there documentation to establish compliance of materials with Appendix A and the WFM? Yes:____ No:____
 Comments: _____

2. Review cellulose insulation products being used for compliance with Appendix A and the WFM.

(a) Indicate cellulose brands used: _____

(b) Are these brands listed in the WFM? Yes: ____ No: ____

(c) Indicate brands used but not listed in the WFM: _____

(d) Does the CAA/LWO have documentation as required in the WFM III.III.A.2 relative to third party testing for each of the above brands which are not listed in the WFM?

Yes:___ No:___ Comments: _____

E. Field Review

The areas reviewed in this section relate to the following WFM requirements:

- All weatherization materials utilized in conjunction with work performed as a part of this program shall, at a minimum, meet the Standards for Weatherization Materials contained in Appendix A, as published in the current DOE/WAP rules and in the WFM III.III.A.1.
- Additional requirements relative to weatherization materials are contained in the WFM (i.e. required test lab labeling of cellulose insulation and smoke detectors).

Agency: _____

Date: _____

- All other materials (i.e., attic and foundation ventilators) not specified shall be of good quality and commercially available.
- All work/measures shall be completed to successfully perform the intended function on a continuing basis where the quality of the product and the installation will provide, where practical, a minimum ten-year life (under normal conditions).

The field review of weatherization materials will include the following:

1. Determine who supplies materials: CAA/LWO:___ Contractor:___ Both:___
2. The field review of required documentation on weatherization materials being used for compliance with DOE Appendix A and the WFM is to be completed as follows:

Two weatherization materials (cellulose insulation and smoke detectors) have been selected for review. Check these materials for compliance with the above standards during the monitoring guide Section V - Job Site Visits. Indicate in Appendix B, item III.A whether the materials comply with the required standards/specifications and have supporting documentation (where needed).

Note: ASTM dating for cellulose is five years behind on their labels per Underwriters Laboratory (UL). A document (dated 06-07-93) has been forwarded to MDHS/BCAEO from UL as verification all cellulose labeled by UL will be up to the current standards/specifications. They also stated they would remove the year from the standard (i.e., ASTM C739) and thereby imply it is up to date. In light of the "UL" clarification we will also accept fiberglass labeled in a similar manner (ASTM C665, no date) and any other product as long as there are markings of the appropriate test standard (i.e., ASTM, ANSI, AGA) which document compliance with Appendix A and the WFM standards/specifications.

F. Certification of Insulation

The areas reviewed in this section relate to the following requirements:

- MDHS/BCAEO requires that all job sites, where an insulation product is used as a thermal barrier, have a Certificate of Insulation.
- The certificate must collect and record specific information about the products used and their installation.
- A copy of the certificate is to be given to the client, one copy is to be affixed to the dwelling weatherized, and a copy shall be maintained in the LWO client/job file.

Note: See WFM III.III.A.2.

Compliance with requirements relative to the certificate of insulation will be reviewed as follows:

Agency: _____

Date: _____

1. Does the Certificate of Insulation form contain the minimum data collection blanks, certification statement, etc., needed to comply with WFM III.III.A.2 (i.e., client address, installer name and address, manufacturer and type of insulation, location and square footage of materials installed, batch number for cellulose insulation, installer's certification/signature)?

Yes: ___ No: ___ Comments: _____

2. Appendix A, of this document, item III.F will be completed relative to the Certificate of Insulation for each client job/file sampled as a part of the Section IV - Work Specifications review. Client/job files will be reviewed for the following items:

- a. Was a completed Certificate of Insulation (where required) found in the client/job files selected?

- b. Was all required information completed on the Certificate of Insulation for the client/job files reviewed?

3. Appendix B, of this document, item III.B will be completed relative to the Certificate of Insulation for each of the Section V - Job Site Visits relative to the following items:

- a. Was a completed Certificate of Insulation (where required) found during Section V - Job Site Visits?

- b. Was all required information completed on the Certificate of Insulation for the job sites monitored?

- c. Was an empty cellulose bag posted at the job site?

IV. WORK SPECIFICATIONS

A. Background and Scope

Weatherization job documentation requirements are established in the Weatherization Field Manual (WFM) and Community Services Policy Manual (CSPM).

The review will be conducted to determine whether the CAA/LWO has followed the WFM and CSPM (see Item C of this section) to ensure that documentation relative to weatherized dwellings is properly completed.

This monitoring will include the review of a sample of client/job files.

B. Sample Selection

Select a sample of completed client/job files of individuals whose homes have been weatherized from the last monitoring visit up to the current date, as follows:

1. Sample will include a minimum of seven files (three for the first monitoring visit and four for the second monitoring visit) for low production agencies with additional files sampled for higher production agencies. For agencies with production averaging 50 or more completions per month, a minimum of twenty files will be sampled (ten for the first monitoring visit and ten for the second monitoring visit).
2. Sample selection should include when possible/applicable: Multiple family housing, mobile homes, homes weatherized by a variety of contractors/crews, homes inspected by various inspectors and homes weatherized by the individual/combined funding sources (i.e., DOE, LIHEAP, MPSC, local MDHS offices, and other local identified sources).

NOTE: During the first monitoring visit the files selected will include a minimum of 66% with MPSC funding included or as the sole funding source.

3. If critical or recurrent problems are found, additional files should be sampled and reviewed relative to problem area(s) to determine the extent of problems and the time period affected.

The sample reviewed was selected from the files of individuals whose homes have been weatherized for the period from the last monitoring visit _____, 200__ to the current date. There were _____ completed client/job files selected for review from the following report months:

_____ 200_ (file(s) _____); _____ 200_ (file(s) _____);
_____ 200_ (file(s) _____); _____ 200_ (file(s) _____);
_____ 200_ (file(s) _____); _____ 200_ (file(s) _____);
_____ 200_ (file(s) _____); _____ 200_ (file(s) _____);
_____ 200_ (file(s) _____); _____ 200_ (file(s) _____).

C. CSPM Items Referenced in This Section:

- 605 Reweathering Of Dwelling Units
- 607 Incidental Repairs
- 608 Multi-Family Unit Eligibility
- 613 Maximum Average Cost Per Unit
- 615 Lead Pamphlet

WFM Chapters/Sections Referenced in This Section:

- II.I.A General Weatherization Measures Guidelines/Policies/Costs
- II.I.B Inspection/Testing/Energy Audit Requirements

Agency: _____

Date: _____

II.II.A Mobile Home Weatherization
II.III Health and Safety
III.I Blower Door Test Requirements
III.II.A.1 Building Check and Job Order Sheet (Samples)

D. Desk Review

The desk review of client/job files and other required documentation will be completed as follows:

- Obtain for review client/job file documentation for the sample selected (item B. of this section).
- Obtain for review the approved audit for any multi family units (5 or more) weatherized.

Selected files/documentation will be reviewed for compliance with the WFM, CSPM, and DOE requirements by completing Appendix A of this document.

Note: Appendix A also includes reviews of the sampled client/job files relative to other sections of this monitoring guide, including Section II - Client Education, Section III - Material Standards/Specifications, Section VI - Energy Audit, Section VII - Quality Control Procedures, and Section VIII - Training.

The Work Specifications review of sampled documents listed below will be completed using Appendix A of this document as follows:

1. Building Check and Job Order Sheet (BCJO)

The BCJO is the basic tool which indicates the Audit used, costs of material and labor for a specific job. It also collects basic information concerning the job site (i.e., location, measurements, special problems) and information as to how the structure fits within MDHS/BCAEO's weatherization measures system and whether measures have been properly addressed pursuant to the WFM and audit.

The following areas are to be reviewed and the Client/Job File Check List contained in this document (Appendix A, item IV.D.1 relative to the BCJO) completed as follows for each of the files sampled. An overall evaluation of compliance (satisfactory or unsatisfactory) should be entered for items "a" through "i" of Appendix A, along with appropriate comments, referencing the sample BCJO included in the WFM.

- (a) Has the type of audit (i.e. NEAT, Priorities, Mobile Home) been indicated?
- (b) Have the proper foundation types (i.e. Heated Foundation, Slab) been indicated?
- (c) Are material/labor costs noted in the proper areas on the BCJO by funding source (indicate on "Appendix A" the funding source(s) totals and source amounts charged to each measure) and do they appear appropriate for the task noted?
- (d) Are all sign-offs complete (specified CAA/LWO staff initials or signatures) and dated? Do the dates correspond with supporting documentation (i.e., daily crew sheets, first contractor on the job's proceed orders, last contractor on the job's invoices, etc.)?

Agency: _____

Date: _____

- (e) Is the BCJO indicative of the required measures being addressed according to the applicable audit, indicated foundation type and existing conditions of the structure, including proper measures documentation?
- (f) Have smoke detectors, venting of clothes dryers, and other health and safety issues (including notation on page 2 of the BCJO of Hazards and Client Notifications) been properly documented and/or addressed?
- (g) Are incidental repair costs (includes necessary "incidental repairs" [CSPM 607] which are not being entered as "additional installation costs" relative to a weatherization measure) appropriate and noted in the proper location on the BCJO?
- (h) Are the contents of the BCJO complete (i.e. all required data and conditions of the structure documented, appropriate data on each measure entered)?

2. Blower Door Test Data

The blower door is utilized to measure the air leakage/tightness (health and safety) of a structure before and after weatherization, thereby indicating the necessity for and/or effectiveness of weatherization measures. When blower door testing is performed, the necessary information is entered on the "Blower Door Test Data Sheet" (BDTDS) or on the appropriate page of the BCJO (WFM II.IV.A). Copies of the completed form are required to be kept in the client/job file. Pursuant to WFM III.I.A, the CAA/LWO is required to conduct blower door tests (pre and post) on all homes weatherized under a NEAT audit, measures priorities, mobile homes, and in most cases buildings with five or more units utilizing an accepted DOE/MDHS/BCAEO audit.

Review the blower door forms for compliance with test completion requirements. Review client/job files sampled for compliance with WFM requirements and proper completion of testing data and related calculations, and enter an evaluation (satisfactory or unsatisfactory) and appropriate comments on the Client/Job File Check List (Appendix A, item IV.D.2).

3. Combustion Appliance Inspection/Testing Data

Combustion appliance inspection and testing, including carbon monoxide testing, is required for all units weatherized. Inspection and testing data are generally recorded on the BCJO (or a facsimile of the "All Combustion Appliances" and "Primary Heat Source" sections of the BCJO). Related requirements are contained in the WFM II.IV.B and C.

Files sampled in this section should be reviewed for compliance with the above WFM requirements.

An evaluation (satisfactory or unsatisfactory) and comments relative to combustion appliance inspection and testing documentation should be noted on the Client/Job File Check List (Appendix A, item IV.D.3).

4. Health & Safety (H&S) Documentation

Health and Safety evaluation and notification requirements apply relative to all units weatherized. H&S requirements are contained in the WFM II.III and CSPM 615.

Agency: _____

Date: _____

Files sampled in this section should be reviewed for compliance with the H&S documentation requirements, including Asbestos Notice (WFM II.III.B), Notice of Indoor Air Quality Concerns (WFM II.III.D), Notice of Potentially Unsafe Condition (WFM II.III.F), Lead Pamphlet (CSPM 615), and other H&S-related documentation.

An evaluation (satisfactory or unsatisfactory) and comments relative to H&S issues should be noted on the Client/Job File Check List (Appendix A, item IV.D.4, sections "a" and "b").

6. Other Back-up Documentation

File documentation requirements would include other related back-up documentation (i.e. contractor's invoices, daily crew labor/materials sheets, NEAT input and Output forms, Refrigerator audit Input/Output documents, mechanical/plumbing/electrical permits, etc.).

For each of the client/job files sampled, complete the Client/Job File Check List (Appendix A, item IV.D.6) relative to back-up documentation. Provide an evaluation (satisfactory or unsatisfactory) and comments if appropriate.

AGENCY: _____

CLIENT/JOB FILE CHECK LIST

Date: _____

Client Name: _____ Job Number: _____
 Location: _____ Report Month: _____
 Contractor: _____ Pre Insp. Date: _____
 Job Start Date: _____ Job Compl Date: _____ Post Insp. Date: _____
 Audit: () Priorities () NEAT () Mobile () Multi - Number of Units _____
 Funding Source: () DOE () LIHEAP () Other: _____

S U NA

Section II. Client Education:

- () () () C. 1. Client Plan of Action with three Energy Action Steps: _____
- () () () 2. Documentation provided if no Client Plan of Action: _____

Section III. Material Standards/Specifications:

- F. Certificate of Insulation: _____
- () () () 1. Attic: _____
- () () () 2. Walls: _____
- () () () 3. Floor/Perimeter: _____
- () () () 4. Cellulose Batch Number Provided: _____
- () () () 5. Contents Complete: _____
- _____
- () () () 6. Comments: _____

Section IV. Work Specifications:

- D. 1. Building Check & Job Order Sheet (BCJO):
- () () () a. Type of Audit Indicated: _____
- () () () b. Home Type Indicated: _____
- () () () c. Materials/Labor Costs Noted/Appropriate: _____
- _____
- () () () d. Sign-Offs and Dates Complete/Appropriate: _____
- () () () e. Proper Measures Addressed: _____
- _____
- () () () f. Smoke Detectors(s), Dryer Venting and Other Health/Safety Issues: _____
- () () () g. Incidental Repair Costs Noted/Proper: _____
- () () () h. Contents Complete: _____
- () () () i. Comments: _____
- _____
- () () () D. 2. Blower Door Test Data: _____
- () () () D. 3. Combustion Appliance Inspection/Testing Data: _____
- () () () D. 4. a. Health and Safety Documentation: _____
- () () () b. Lead Notification/Documentation: _____
- () () () D. 5. Infrared Scan: _____
- () () () D. 6. Proper Back-up Documentation: _____

Section VI. Energy Audit:

- () () () C. 1. Appropriate Audit Used: _____
- () () () C. 2. Audit Required Measures Addressed or Acceptable Documentation or Labor and Material Limit Reached: _____
- () () () C. 3. Audit Review: _____

Section VII. Quality Control Procedures:

- () () () D. 2. Client Insp./Assess. form: _____

Section VIII. Training:

- () () () C. 1. Preinspection/Postinspection per BCJO by a Certified Inspector: _____

NOTE: Additional comments may be noted on the back of this form.

AGENCY: _____

CLIENT/JOB FILE CHECK LIST

Date: _____

NOTE: Additional comments may be noted on the back of this form.

Agency: _____

Date: _____

V. JOB SITE VISITS

A. Background and Scope

Living units weatherized are required to be completed in compliance with the Weatherization Field Manual (WFM) and U.S. Department of Energy (DOE) requirements, and the applicable audit.

The review will be completed to determine whether the Community Action Agency/Local Weatherization Agency (CAA/LWO) has met WFM, DOE, and audit requirements.

This monitoring will include the review of a sample of weatherized units completed and/or in progress.

B. Sample Selection

The job site visit sample will generally be selected from the client/job files sampled in Section IV - Work Specifications, of this guide. The following criteria will be adhered to, if possible:

1. A minimum of five jobs from the CAA/LWO reported unit production (jobs in progress may also be reviewed) for the period reviewed will receive a site visit. For agencies with production averaging 50 or more completions per month, a minimum of ten jobs will receive a site visit.

This would translate to three jobs for the current program years' monitoring (PY 2005/2006) of the two agency visits for the regular production agencies and agencies averaging 50 or more completions per month a minimum of 5 jobs at each visit.

2. The sample selected should be drawn from throughout the period being monitored with some emphasis on more recent completions.
3. To the extent possible, different contractors and/or CAA/LWO crews that produced completed units during the period being reviewed, will be selected.
4. A variety of housing types (i.e. single family, multifamily, mobile homes) should be sampled, if applicable.
5. To the extent possible, homes inspected by different preinspectors and postinspectors will be selected.

The following jobs were selected for job site visits:

Jobs in progress - Job number(s) _____

Jobs completed/not yet postinspected - Job Number(s) _____

Jobs completed and postinspected - Job number(s) _____

C. WFM Chapters/Sections Referenced in This Section:

- II.I.C.1 Attic Insulation
- II.I.C.2 Attic Venting
- II.I.C.3 Band Joist (Sillbox) Insulation
- II.I.C.4 Duct/Pipe Insulation/Repair
- II.I.C.5 Floor Insulation
- II.I.C.6 Foundation/Perimeter Insulation
- II.I.C.7 Foundation Ventilation
- II.I.C.8 Furnace/Boiler/Space Heater Replacement

Agency: _____

Date: _____

II.I.C.9	Furnace Flame Retention Burner (Oil)
II.I.C.10	Infiltration/Exfiltration Measures
II.I.C.11	Smoke Detector
II.I.C.12	Storm Windows
II.I.C.13	Venting Clothes Dryers
II.I.C.14	Wall Insulation
II.I.D.1	Compact Fluorescent Light Bulbs
II.I.D.2	Refrigerator Replacement
II.I.D.3	Water Heaters
II.I.E.1	Low Flow Shower Head
II.I.E.2	Water Heater Insulation
II.I.E.3	Clock Setback (Smart) Thermostat
II.I.E.4	Furnace/Boiler/Space Heater Tune-Up/Repair
II.II.A	Mobile Home Weatherization
II.III	Health and Safety
II.IV.A	Blower Door Testing
II.IV.B	Carbon Monoxide Testing
II.IV.C	Combustion Appliance Inspection/Testing
II.IV.D	Infrared Scans

D. Field Review

Job site visits are conducted to determine if the appropriate weatherization measures/audit system (see Section VI - Energy Audit) is being, or has been, followed correctly pursuant to WFM II.I.B, if units are being completed in compliance with WFM and DOE requirements, and to rate the quality of the workmanship and its impact on the longevity of the measure in conjunction with its appearance. The quality of the preinspection, postinspection, client/job file documentation, materials used, and client education are also evaluated. Site specific training and technical assistance may be provided at this time.

A "Job Site Check List", Appendix B of this document, is to be completed for each job site monitored for compliance with the WFM and DOE requirements. Applicable items listed in Appendix B will be evaluated (satisfactory or unsatisfactory) and appropriate comments entered.

Note: Appendix B includes reviews at the sampled job sites relative to other sections of this monitoring guide, including Section II - Client Education, Section III - Materials Standards/ Specifications, Section IV - Work Specifications, Section VI - Energy Audit, Section VII - Quality Control Procedures and Section IX - Technical Assistance.

The Job Site review of sampled units weatherized will be completed using Appendix B as follows:

1. General Job Site Information

General Job Site Information relative to the job, work status, and audit used should be contained in the client/job file. Information required will be recorded on the "Job Site Check List" (Appendix B, item I). This information will be reviewed and evaluated during the job site visits.

2. Site Specific Forms and Client Education

Conditions are evaluated relative to the need for/completion of site specific forms, including Health and Safety notices (i.e. Notice of Indoor Air Quality Concern, Asbestos Notice), and written client approvals/disapprovals. In addition if the client is available they

Agency: _____

Date: _____

should be interviewed relative to client education they received as a part of Section II - Client Education review (i.e. energy saving tips, explanation of the work done).

These items will be evaluated on the "Job Site Check List" - Appendix B, item II, by entering an evaluation (satisfactory or unsatisfactory) along with appropriate comments.

Note: Any findings relative to client education from this section should be reported under Client Education in the Monitoring Report.

3. Material Standards/Specifications

The Material Standards/Specifications field review and Certification of Insulation requirements as discussed in Section III of this document will be completed during the job site visits and evaluated on the "Job Site Check List" - Appendix B, item III, by entering an evaluation (satisfactory or unsatisfactory) along with appropriate comments.

Note: Any findings relative to the materials field review and Certification of Insulation from this section should be reported under Material Standards/Specifications in the Monitoring Report.

4. Blower Door Testing

The blower door testing data is reviewed in conjunction with the job site visit to evaluate compliance with WFM requirements.

The following areas are to be reviewed and the "Job Site Check List"- Appendix B, item IV, completed by entering an evaluation (satisfactory or unsatisfactory) along with appropriate comments:

- a. Were blower door tests completed during the preinspection and on job completion in compliance with the WFM III.I.A?
- b. Does preinspection data recorded relative to conditions, CFM requirements, and related documentation and calculations appear to be correct?
- c. Do postinspection data/calculations/results appear correct and acceptable?
- D. Testing will be completed during the Job Site Visit to verify results and competence of the agency/contract inspector(s) abilities.

Note: Blower door testing/calculation requirements are contained in WFM II.IV.A.

5. Combustion Appliance Testing

The combustion appliance testing data is reviewed in conjunction with the job site visit to evaluate compliance with WFM requirements. At least one job site visit shall include a monitoring review of combustion appliance testing by CAA/LWO staff who normally perform these functions.

The following areas are to be reviewed and the "Job Site Check List"- Appendix B, item V completed by entering an evaluation (satisfactory or unsatisfactory) along with appropriate comments:

Agency: _____

Date: _____

- a. Were combustion appliance tests completed during the preinspection and on job completion, in compliance with the WFM II.IV.B & C?
- b. Does preinspection data recorded relative to conditions, and related documentation appear to be correct?
- c. Does postinspection data and results appear correct and acceptable?
- d. Is combustion appliance testing equipment properly calibrated?
- e. Was combustion appliance testing conducted by CAA/LWO staff during the job site visit complete and properly performed?

Note: Testing may be completed during the Job Site Visit to verify results.

6. Weatherization Measures

Weatherization measures including audit required measures (WFM II.I.B), Incidental Repairs (WFM II.I.A), Health and Safety measures (WFM II.III. A and H), and Optional Weatherization Measures (WFM II.I.D) will be reviewed during job site visits. Measures will be evaluated for compliance with WFM Standards and Specifications (WFM II.I.C and D) and to determine the quality and completeness of the weatherization work.

Weatherization measures as applicable, are to be reviewed and the "Job Site Check List" (Appendix B, item VI) completed by entering an evaluation (satisfactory or unsatisfactory), along with appropriate comments.

7. Infrared Scans

Infrared wall scans will be completed for each contractor/crew identified and conducted by the Technical Weatherization Specialist and/or LWO inspector(s) for scanning.

Calculations should be completed for each job scanned to determine the percent of void area present. Jobs in excess of 5 percent would require corrective action. Or jobs containing void areas at the top of the wall cavities wherein a blower door reading and/or agency installed make-up air handler cannot correct the foundation area and/or client lifestyle moisture conditions will require corrective action regardless of the percent of void wall space. Additional scanning of the same contractor/crew is required if repetitive problems are found (i.e., excessive settling due to low density insulation fill).

An evaluation (satisfactory or unsatisfactory) and comments relative to this review should be noted on the Client/Job File Check List (Appendix B, item VI.B.4) of the "Infrared Scan" will be indicated and any follow-up corrective action, shall be completed for jobs scanned to determine if the above requirements have been met.

8. Building Check and Job Order Sheet (Building and Check Order form)

The Building and Check Order form is reviewed in conjunction with the job site visit to verify if the documentation is proper and to establish that the appropriate measures have been addressed and the materials charged have been installed. In addition the material/labor costs are reviewed by funding source to determine if they are appropriate for the tasks addressed.

Agency: _____

Date: _____

The review will be completed and an evaluation (satisfactory or unsatisfactory) entered on the "Job Site Check List" (Appendix B, item VII) along with appropriate comments.

9. Energy Audit

The energy audit shall be reviewed in conjunction with the Job Site Visits to determine viability from the documented Building and Check Order form audit to the actual building. The review will be completed in compliance with Section VI.D of this document and recorded on the "Job Site Check List" (Appendix B, item VIII).

Note: Any findings relative to the energy audit noted during the Job Site Visit will be reported under Energy Audit in the Monitoring Report.

10. Overall Summary of Job Site Visit

An overall evaluation of the workmanship will be completed during the job site visit. An evaluation (satisfactory or unsatisfactory) will be entered on the "Job Site Check List" (Appendix B, item IX.A) along with appropriate comments in the summary (Appendix B, item IX.B).

A summary of the findings for the job site visit (Appendix B) will be collected and noted on the "Job Site Check List" (Appendix B, item IX.B) along with appropriate comments.

11. Technical Assistance

Technical Assistance provided during the Job Site Visit or determined to be needed, will be recorded on the "Job Site Check List" (Appendix B, item X). This is a part of Section IX - Technical Assistance review.

Note: Technical Assistance will be reported under "Technical Assistance" in the Monitoring Report summary letter to the agency.

Agency: _____

Date: _____

VI. ENERGY AUDIT

A. Background and Scope

Energy audit requirements are contained in the WFM II.I.B. Single family and multi-family buildings with 4 units or less are required to be weatherized in accordance with the National Energy Audit Tool (NEAT). NEAT is a computerized home energy audit which applies engineering and economic calculations to evaluate energy conservation measures. It can be used to rank measures for each individual house, or to establish a priority list of conservation measures for similar housing types.

Standard wood frame homes with an operable furnace/boiler with an SSE of 70% or greater and requiring at least one insulation measure, may be weatherized in accordance with the NEAT Weatherization Measures Priorities. If the "Priorities" BCJO is incomplete the Audit is not complete, therefor it is not a completed job. Homes not meeting the above requirements require a NEAT audit. Agencies may elect to complete NEAT audits for any/all single family and multi-family buildings with 4 units or less.

Mobile homes are weatherized in accordance with the DOE Project Retro-Tech. A list of measures were so determined for mobile homes and approved by DOE.

Multifamily structures with five or more units within the building are required to have an energy audit completed by a utility or other entity with a multifamily audit approved by DOE (per CSPM 608). Such audits must be submitted to MDHS/BCAEO and approved prior to the weatherization work.

Local weatherization operators (LWOs) may, as a part of their weatherization contract, establish a labor and material (L&M) cost limit per home (per CSPM 304). In determining weatherization measures, if the L&M cost limit is reached on a home before all audit required measures have been addressed, the LWO will have the option to stop weatherization work and the unit would be considered a completion.

Monitoring of client/job files and job sites will include a review for compliance with energy audit requirements.

B. WFM Chapters/Sections Referenced in This Section

II.I.A General Weatherization Measures Guidelines/Policies/Costs

II.I.B Inspection/Testing/Energy Audit Requirements

II.II.A Mobile Home Weatherization

C. Desk Review

The type of Energy Audit utilized will be indicated at the top of Appendix A of this document, for each client/job file sampled (see section IV.B - Sample Selection, of this document).

Energy Audits will be reviewed as a part of the client/job file reviews by entering in Appendix A, item VI.C, an evaluation (satisfactory or unsatisfactory) of the audit utilized for each file reviewed including the following:

1. Was the appropriate audit used for the building type (single family, mobile home, or multifamily, NEAT, NEAT Measures Priorities, etc.)?

Agency: _____

Date: _____

2. Were all audit required measures addressed? If not, was acceptable documentation provided as to why required measures were not addressed or was the labor and material (L&M) cost limit reached?
3. The audit utilized will be reviewed for proper application and compliance with WFM energy audit requirements.

a. NEAT Weatherization Measures Priorities

Was the building 1-4 units and standard wood frame construction?
Was the furnace/boiler operable with a Steady State Efficiency of 70% or greater and at least one insulation measure completed?

b. NEAT Audit

Were the appropriate parameters utilized (MDHS/BCAEO assigned weather data, agency labor/material prices, MDHS/BCAEO assigned average fuel costs, and/or a MDHS/BCAEO approved waiver)?

Were pre and projected post blower door CFM @50 pa. entered?

Was the data entered properly?

Was data entered consistent with the BCJO?

Was the SIR order followed correctly?

Did measures addressed have an SIR of **1.5** or greater?

Note: If NEAT was used, at least one unit will be re-evaluated using NEAT.

c. DOE Project Retro-Tech Priorities

Were the DOE Project Retro-Tech Priorities utilized for mobile homes?

d. MDHS/BCAEO Approved Multifamily Audit

Is there an MDHS/BCAEO approved audit for multifamily buildings containing 5 units or more?

D. Field Review

The type of Energy Audit utilized will be indicated in Section I of Appendix B for each Section V - Job Site Visit.

The energy audit will be evaluated during the Section V - Job Site Visits. The Job Site Check List (Appendix B, item VIII) will be completed relative to the Energy Audit review, by entering an evaluation (satisfactory or unsatisfactory), along with appropriate comments relative to the following:

1. Was the appropriate audit used (per WFM II.I.B)?
2. Were all audit required measures completed or acceptable documentation provided as to why they were not addressed or was the labor and material limit reached?

Agency: _____

Date: _____

VII. QUALITY CONTROL PROCEDURES

A. Background and Scope

The Federal Register (February 1, 2002) 10 CFR, Part 440.16(g) states: No dwelling unit may be reported to DOE as completed until all weatherization materials have been installed and the subgrantee, or its authorized representative, has performed a final inspection(s) including any mechanical work performed and certified that applicable work has been completed in a workmanlike manner and in accordance with the priority determined by the audit procedures required by 440.21.

MDHS/BCAEO has responsibility to "insure the quality of work and adequate financial management control" per the Federal Register 440.12(b)(6). The local weatherization operator's quality control procedures will be evaluated as a part of this monitoring.

B. CSPM Items Referenced in This Section:

304 Labor/Material Cost Limit
603 Oversight of Local Weatherization Programs
604 Itemized Contractor Invoices
612 Applicant File Documentation

WFM Chapters/Sections Referenced in This Section:

III.II.A.3 Client Inspection/Assessment
III.II.A.4 Unit Completion Reference
III.II.B File Documentation Checklist
III.IV.D Lead Safe Work Practice Training

C. Contractor Review

All agency contractors providing weatherization services, including mechanical contractors, are required to have a current Michigan license, for the appropriate trade, and insurance.

"LSW", licensing, and insurance documentation maintained by the agency will be reviewed during this monitoring.

The Contractor Evaluation Work Sheet (Work Sheet A from this guide) will be completed for all current contractors indicating licensing, insurance status, and "Lead Safe Work Practice Training" attendance.

D. Postinspection Evaluation

1. Field Review

Postinspection is required on every job site to ensure the quality and completeness of work in accordance with WFM III.II.A.4.

A review will be conducted of the postinspection process during the Section V - Job Site Visits, for compliance with various federal and state requirements as cited above. Evaluations completed on the Job Site Check List - Appendix B will be used as a basis for evaluating the postinspection process relative to the following issues:

Agency: _____

Date: _____

- a. Were all required measures addressed or acceptable documentation provided as to why they were not addressed, or the labor & material limit reached?
- b. Were quantities of materials noted on the BCJO verified correctly during the postinspection?
- c. Was the quality of work as approved by the inspector acceptable?
- d. Were corrections required by the inspector?
- e. Where corrections were required, was corrective action appropriate, documented as completed, and approved by inspector where appropriate?

Concerns should be addressed in the Monitoring Report under Quality Control Procedures.

2. Desk Review

Client Inspection/Assessment-WFM III.II.A.3, contains the Client Inspection/Assessment form (MDHS/BCAEO-1008 [11-02]). The client inspection and assessment is part of the postinspection sign-off. The form lists the weatherization activities by measure and the client's assessment of the work.

For each of the client/job files reviewed, complete the Client/Job File Check List (Appendix A, item VII.D.2) relative to completing the client inspection and assessment form.

The evaluation will determine if the Client Inspection and Assessment form was completed, including:

- a. Did the client assess the work?
- b. Were client and inspector signatures completed and dated?
- c. If the Client Inspection/Assessment form was not completed, was acceptable documentation provided as to why it was not?

E. Wx Administrative Systems Evaluation

In conjunction with monitoring conducted during this visit considering Previous Findings (Section I), and any findings from this monitoring, an evaluation will be made relative to agency administrative systems. In addition agency staff will be interviewed for their perception of their strengths and weaknesses. The monitor will provide further comment/an evaluation of strengths, weaknesses, and best practices, if appropriate. If problem areas are determined that relate to agency standard operating systems, they will be addressed in the Monitoring Report for this visit.

- 1. LWO Strengths per Agency Staff: _____

Agency: _____

Date: _____

2. LWO Areas Needing Improvement per Agency Staff: _____

3. LWO Best Practices per Agency Staff: _____

4. Name(s) of Agency Staff Interviewed: _____

5. Monitor's Evaluation: _____

VIII. TRAINING**A. Background and Scope**

As required in the DOE Weatherization Assistance Program for Low-Income Persons rules (February 1, 2002), 10 CFR 440.12(b)(7), the MDHS/BCAEO Weatherization State Plan includes provisions for required training. CAAs/LWOs are required to obtain training and certification for inspectors, and training relative to blower door use and calculations, and combustion appliance testing.

Training and certification status and needs relative to inspectors, blower door testing, combustion appliance testing, weatherization testing equipment and Lead Safe Work (LSW) practice certification will be evaluated and discussed with agency staff during the course of the monitoring visit.

MDHS/BCAEO is committed to meeting other CAA/LWO weatherization training needs. The monitor will review and discuss weatherization training needs with the CAA/LWO. Needed training and/or technical assistance will be provided during the monitoring visit if possible. The Technical Weatherization Specialist will report and follow-up on unaddressed training needs with the Technical Weatherization Supervisor.

Information on possible means of meeting unaddressed training needs will be provided including the availability of various types of training (i.e. Inspector, furnace testing, weatherization equipment, Contractor/Crew, etc.).

Compliance with these requirements and objectives will be determined during this monitoring.

B. WFM Chapters/Sections Referenced in This Section

II.IV.A	Blower Door Testing
II.IV.B	Carbon Monoxide Testing
II.IV.C	Combustion Appliance Inspection/Testing
III.IV.A	Blower Door Training
III.IV.B	Inspector Training/Certification
III.IV.C	Infrared Scanner Training
III.IV.D	Lead Safe Work Practice Training

C. Training Requirements**1. Inspection Certification:**

WFM III.IV.B states each LWO must have at least one person certified to complete inspections.

Inspectors completing inspections during the period of this monitoring will be listed on the Inspector Certification Work Sheet B, of this document, and their certification status entered as follows:

- a. List the name and title of all persons performing inspections for the CAA/LWO in column a. For persons not certified note the date started as an inspector.
- b. Enter from the MDHS/BCAEO Inspectors Currently Active list, the date each person passed certification testing for inspector in column b.
- c. When testing results contained in the MDHS/BCAEO list indicate a conditional status record in column c:
 - (1) The date when conditional certification was issued.

Agency: _____

Date: _____

(2) The date when conditional certification was upgraded to full certification.

d. Enter from MDHS/BCAEO Inspectors Currently Active list, whether inspectors or others have attended infrared scanner orientation.

For each of the client/job files sampled during the Section V - Work Specifications review, complete the Client/Job File Check List (Appendix A, item IX.C.1) relative to proper certification of inspectors completing the BCJO. Determine if any persons other than those listed on Work Sheet B have initialed preinspection or postinspection sign-offs on the BCJO. Complete Work Sheet B relative to those persons.

2. Blower Door Competence/Training

Pursuant to WFM III.IV.A, each LWO shall have at least one staff person trained and capable of completing blower door testing and related calculations. It is recommended that all LWO inspectors have the ability to perform these functions.

Work Sheet B of this guide, item "d" will be completed for each inspector relative to their ability to complete blower door testing and calculations, based on the Section V.D.2 - Blower Door Test Data client/job file reviews and Section VI.D.4 - Blower Door Testing job site visit reviews, if the reviewed inspector cannot complete a proper blower door analysis it is to be noted on Attachment B and Worksheet B and cited for further required training.

3. Combustion Appliance Testing Competence/Training

Pursuant to WFM II.IV.C, all combustion appliances shall be inspected and tested during preinspection and postinspection by certified inspectors and/or a licensed mechanical contractor.

Work Sheet B of this guide, item "e" will be completed for each inspector and/or mechanical contractor performing combustion appliance inspections, relative to their ability to complete inspection, testing and documentation requirements. Evaluations will be based on the Section V.D.3 - Combustion Appliance Inspection/Testing Data client/job file reviews and the Section VI.D.5 - Combustion Appliance Testing job site visit reviews, if the reviewed inspector cannot complete a proper combustion analysis it is to be noted on Attachment B and Worksheet B and cited for further required training.

4. Infrared Scanner Orientation Training

Pursuant to WFM III.IV.C, individuals using the state owned infrared scanners are required to have completed the infrared scanner orientation training. Work Sheet B of this guide, item "f" will be completed for each inspector or other individuals relative to attendance of this training.

5. Lead Safe Work Practice Training

Pursuant to WFM III.IV.D, individuals who inspect, supervise, and/or work on the homes as specified in Michigan's weatherization program are required to attend one of the "Lead Safe Work Practice Training" sessions. Work Sheet A of this guide, item "LSW Practice Training" and Work Sheet B of this guide, item "g" will be completed for each contractor and inspector or other individuals relative to attendance of this training. If the individuals are not certified the person is to be cited and allowed 30 days to obtain the required "LSW" training or they will no longer be allowed to work on a State of Michigan funded Weatherization Assistance Program site.

Agency: _____

Date: _____

6. Training Needs Assessment

The monitor will discuss with the CAA/LWO, Wx training needs identified during the monitoring visit and provide technical assistance or information on possible means of meeting training needs. The availability of various types of training (i.e. Wx Inspector, Wx Contractor/Crew, NEAT) will be discussed.

- a. Identify below needs for training as required by the state or requested by the agency:

Number of Participants Requiring:			
Inspector Training	Blower Door Training	Combustion Appliance Training	Lead Safe Work Practice Training

- b. Identify training (other than required training) requested by LWO and the number of trainees: _____

- c. Identify training recommended by the monitor based upon this monitoring review: _____

6. Training Provided

To the extent possible, the monitor will provide needed technical assistance, as identified in item 4 above, during this monitoring visit. The technical assistance provided during this visit will be identified below.

Identify type of technical assistance provided, number of agency staff involved, number of agency contractors/workers involved, and number of others involved (identify others - i.e. other CAAs/LWOs, clients, etc.):

Participants Provided with Technical Assistance:			
Type of Technical Assistance	Number Attending Technical Assistance		
	LWO Staff	Contrs/Workers	Others

7. Unaddressed Training Needs

Training needs identified in item 5 above, which are not addressed during this monitoring visit, will be discussed with the Technical Weatherization Program Manager relative to follow-up and addressed in the monitoring report for this visit.

Agency: _____
 Date: _____

IX. TECHNICAL ASSISTANCE

A. Background & Scope

MDHS/BCAEO is committed to provide technical assistance (TA) to CAAs/LWOs to improve the quality, efficiency and effectiveness of the Wx program.

Based on the monitoring completed during the visit and discussions with agency staff, the monitor will determine what technical assistance is needed. To the extent possible Technical Assistance will be provided by the Technical Weatherization Specialist during the visit. Additional TA needs will be assessed.

B. TA Provided

Identify below TA provided during the monitoring visit (TA provided during the Section V - Job Site Visits is identified in Appendix B, item X.A).

TECHNICAL ASSISTANCE PROVIDED		
Topic of TA	Name(s) of Participant(s)	Provided by
Mat. Stds./Specs. (jobs ____, ____, ____, and ____)		
Blower Door (jobs ____, ____, ____, and ____)		
Blwr. Dr. Min. Specs. (jobs ____, ____, and ____)		
Health and Safety (jobs ____, ____, ____, and ____)		
I.A.Q. (jobs ____, ____, ____, ____, and ____)		
Structural Conditions (jobs ____, ____, ____, and ____)		
Audit (jobs ____, ____, ____, ____, and ____)		
Pre/Postinsp (jobs ____, ____, ____, ____, and ____)		
Measures Applications (jobs ____, ____, ____, and ____)		
Combustion Appliances (jobs ____, ____, ____, and ____)		
BCJO (jobs ____, ____, ____, ____, and ____)		
Cert. Of Insul. (jobs ____, ____, ____, and ____)		

EXIT INTERVIEW

LWO: _____

A. Date: _____

B. Persons in Attendance:

CAA/LWO Staff:

<u>Name</u>	<u>Title</u>
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

MDHS/BCAEO Staff:

<u>Name</u>	<u>Title</u>
James W. Smith	Technical Weatherization Specialist
_____	_____
_____	_____

Others (Identify Organization):

<u>Name</u>	<u>Title</u>
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

C. Summary of Review Findings Discussed:

D. Comments:

FAX

Name: Aaron Kraft, Energy and Housing Coordinator
Organization: WCET Wx

Fax: 734-544-6731
Phone: 734-544-2947

From: Pete Weiss Jr, Supervisor
Technical Weatherization Division

Date: May 19, 2005

Subject: July 2005 Monitoring Findings
Pages: 3

Comments: Aaron, here are the findings from Russ' previous monitoring visit during July 17 through 19, 2005, you guys did a nice job in the weatherization program. Please FAX (517) 241 - 9994 me back or e-mail your corrections so I can write the monitoring report with the corrections already in place. If you have any questions please give me a call at (517) 242 - 3795 or e-mail me at WEISSP@MICHIGAN.GOV.

PREVIOUS FINDINGS

CLIENT EDUCATION

MATERIAL STANDARDS and SPECIFICATIONS

Materials

Thermal Insulation Certification

WORK SPECIFICATIONS

Building Check and Job Order Sheet

Blower Door Test Data

Combustion Appliance Inspection/Testing

Health and Safety Documentation

Infrared Scans

Back-Up Documents

JOB SITE VISITS

Finding__ - Job :

Finding__ - Job :

Finding__ - Job :

Finding__ - Job :

Finding__ - Job :

ENERGY AUDIT

National Energy Audit Tool (NEAT) Weatherization Measures Priorities

National Energy Audit Tool (NEAT) Audits

Mobile Home Audits

Multifamily Audits

QUALITY CONTROL PROCEDURES

Contractor Review

Postinspection Evaluation

Weatherization Systems Evaluation

TRAINING COMPLIANCE

Weatherization Inspector Evaluation

Blower Door Competence Training

Combustion Appliance Testing Competence/Training

Lead Safe Work Practices Training