**Weatherization Program Monitoring Questionnaire**

**Agency:** Choose an item

**Program Year of Monitoring Review:** Choose an item

**Dates of Review:** Click here to enter text

**Monitor/s:** Choose an item

**Information**

Previous monitoring dates:
Click here to enter text

Does weatherization staff have access to DCAA correspondence including memos? Please explain.
Click here to enter text

Does the weatherization coordinator have copies of contracts with the state (utilities, HEAP, DOE)? Where are they located?
Click here to enter text

Does the weatherization coordinator receive fiscal information from its agency fiscal department? Is this on a monthly basis or more often? Please explain.
Click here to enter text

Is WAMS backed-up? Please explain where/how this is done.
Click here to enter text

Does the agency have a policy regarding when the client is not home? If so, is the policy written or verbal? If it is a written policy, please email the policy to the monitor listed at the top of this questionnaire.
Click here to enter text

Does the agency have a policy regarding when a minor is home alone? If so, is the policy written or verbal? If it is a written policy, please email the policy to the monitor listed at the top of this questionnaire.
Click here to enter text

How often is fuel data for clients not with investor-owned utilities collected (propane, municipalities, etc.)?
Click here to enter text
 **Outreach Offices**

How many outreach offices does the agency maintain?
Click here to enter text

How are the outreach offices kept informed about the Weatherization Program and any changes in the program that they may need to be aware of (meetings, email, etc.)?
Click here to enter text
When was the last time the outreach offices were reminded that an over-income client may be eligible for weatherization if the client receives SSI or FIP?
Click here to enter text

**Weatherization Staff**

Who schedules the evaluations?
Click here to enter text

Who schedules the inspections?
Click here to enter text

Are the contractors on-site during the inspection? If so, please explain.
Click here to enter text

Who performs evaluations? Does this person/s need additional required training? If so, please list.
Click here to enter text

Who performs inspections? Does this person/s need additional required training? If so, please list.
Click here to enter text

Who enters data into the NEAT/MHEA Audit? Please list each individual.
Click here to enter text

Are there any concerns or questions about the Audit? If so, please explain.
Click here to enter text

What client education is the agency providing prior to the visit? While conducting the evaluation and inspection?
Click here to enter text

Who provides the clients with the Lead Paint Notifications?
Click here to enter text

Who performs the initial combustion appliance safety inspection?
Click here to enter text

Who performs the post combustion appliance safety inspection?
Click here to enter text

Who performs the appliance metering?
Click here to enter text

Who installs the CFLs?
Click here to enter text

Who installs the pipe wrap, faucet aerators, and showerheads?
Click here to enter text

Where do they note in the file the location of the installed CFL/utility measure?
Click here to enter text

**Furnace Contractors**

How many furnace contractors does the weatherization program utilize?
Click here to enter text

Does the program have enough furnace contractors? If not, what has been done to attract additional contractors?
Click here to enter text

Do the contractors work in the program’s entire service area? If not, please explain.
Click here to enter text

Which contractors perform tune/cleans? Will those contractors also perform tune/cleans on mobile home furnaces?
Click here to enter text

Which contractors repair and replace furnaces? Will those contractors also repair and replace mobile home furnaces? If a contractor will only work on furnaces with a certain fuel source, please explain.
Click here to enter text

Which contractors repair and replace boilers?
Click here to enter text

Which contractors repair and replace water heaters? Will those contractors also repair and replace mobile home water heaters? If a contractor will only work on water heaters with a certain fuel source, please explain.
Click here to enter text

How are the contractors trained on Weatherization Work Standard changes?
Click here to enter text

What information is given to the contractors to perform the job (i.e. a copy of the evaluation, photos, etc.)? Who do they contact with questions?
Click here to enter text
 **Tune/Cleans**

Are the tune/cleans a flat rate (bid yearly with the winner awarded jobs for a year) or bid competitively for each job? If agency personnel performs this task, please explain and skip to the next section.
Click here to enter text

If the flat rate method of contracting with contractors for tune/clean work is utilized, please indicate when the flat rate was last updated, the process for the update, and how the winner/s was selected.
Click here to enter text

If the competitive bid method of contracting with contractors for tune/clean work is utilized, please explain the bid process and how the winner is determined.
Click here to enter text
 **Furnace and Water Heater Repairs/Replacements**

Explain the competitive bid method of contracting with contractors for furnace and water heater repairs and replacements. Please include:

* Who the bids are sent to.
* How the bidding opportunity is advertised.
* The method for accepting bids (sealed, fax, etc.).
* How long the contractors have to return the bid.
* The process of the bid opening (when are the bids opened, who opens them, is a bid tabulation sheet maintained).
* How incomplete bids are addressed.
* How the winner is determined.
* How the winner is notified.
* Explain how the bidders are notified of the results.
* The number of jobs each contractor can have at one time.

Click here to enter text

Is it possible the same furnace contractor will perform the tune/clean as well as the repair/replacement? If yes, please explain how the contractor cannot call for unnecessary repairs/replacements?
Click here to enter text

Explain the change order process. Include who completes the change order, when the change order is completed, and who approves it.
Click here to enter text
 **Weatherization Crews**

Does the agency utilize weatherization crews? If not, please enter “NA” and skip to the next section.
Click here to enter text

How many crew members and leaders work for the agency?
Click here to enter text

Explain how the crews are divided (i.e. We have (4) 2-man crews with (1) crew leader for the crews).
Click here to enter text

Does each crew have its own vehicle? If not, please explain.
Click here to enter text

How are new crew members trained?
Click here to enter text

How are crewmembers trained on Weatherization Work Standard changes?
Click here to enter text

What information is given to the crews to perform the job (i.e. a copy of the evaluation, photos, etc.)? Who do they contact with questions?
Click here to enter text

Do the crews have copies of the Material Safety Data Sheets? Where are they kept?
What information is given to the crews to perform the job (i.e. a copy of the evaluation, photos, etc.)?
Click here to enter text
 **Weatherization Contractors**

How many weatherization contractors does the program utilize?
Click here to enter text

Does the program have enough weatherization contractors? If not, what has been done to attract additional contractors?
Click here to enter text

Do the contractors work in the program’s entire service area? If not, please explain.
Click here to enter text

Which contractors work on stick-built homes and which work on mobile homes?
Click here to enter text

How are the contractors trained on Weatherization Work Standard changes?
Click here to enter text

What information is given to the contractors to perform the job (i.e. a copy of the evaluation, photos, etc.)? Who do they contact with questions?
Click here to enter text

Is weatherization work flat rate or bid competitively for each job?
Click here to enter text
 **Weatherization Flat Rate**

If the flat rate method of contracting with contractors is utilized, please indicate when the flat rate was last updated, the process for the update, and how the work is distributed.
Click here to enter text

Explain the change order process. Include who completes the change order, when the change order is completed, and who approves it.
Click here to enter text
 **Weatherization Competitive Bid**

Explain the competitive bid method of contracting with weatherization contractors. Please include:

* Who the bids are sent to.
* How the bidding opportunity is advertised.
* The method for accepting bids (sealed, fax, etc.).
* How long the contractors have to return the bid.
* The process of the bid opening (when are the bids opened, who opens them, is a bid tabulation sheet maintained).
* How incomplete bids are addressed.
* How the winner is determined.
* How the winner is notified.
* Explain how the bidders are notified of the results.
* The number of jobs each contractor can have at one time.

Click here to enter text

Explain the change order process. Include who completes the change order, when the change order is completed, and who approves it.
Click here to enter text
 **Exhaust Fans**

Who installs exhaust fans if it’s a straight replacement?
Click here to enter text

What if wiring needs to be connected to a power source?
Click here to enter text
 **Rental Housing**

Are very many rentals being weatherized? Please explain.
Click here to enter text

Please explain the process when an eligible client is a renter. Is the landlord or the client contacted first? What contact is made?
Click here to enter text
 **Miscellaneous**

Who installs the CFLs?
Click here to enter text

Who installs water heating measures (faucet aerators, low-flow showerheads, pipe wrap)?
Click here to enter text

Who installs smoke and CO alarms?
Click here to enter text

How many homes need to be weatherized to fulfill the contracts? How is this determined?
Click here to enter text

What procedure is in place to ensure homes are not reweatherized before the eligibility date?
Click here to enter text

Explain the process for ensuring jobs get done in a timely fashion and don't "fall through the cracks.”
Click here to enter text

Explain how the priority list is maintained.
Click here to enter text

Describe the agency’s policy regarding client complaints.
Click here to enter text

Does the agency have a designated Health and Safety Plan and Officer as outlined by OSHA? Please email a copy to the program monitor listed on the first page.
Click here to enter text

Does the agency have an agency-specific Policy and Procedures manual? Please email a copy to the program monitor listed on the first page.
Click here to enter text

Please explain the entire weatherization process from the time the priority list is printed to when the contractor is paid.
Click here to enter text