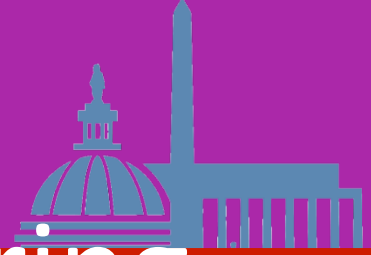


20  
17 **A N N U A L**  
*Training Conference*



Successful Monitoring-  
Sharing Best Practices

Steve Nall

Weatherization Manager, JobSource



# Successful Monitoring- Sharing Best Practices

Steve Nall

Weatherization Manager, JobSource

222 E. 10<sup>th</sup> St., Ste. C

Anderson, IN 46012

765-615-7015

[snall@madisoncounty.in.gov](mailto:snall@madisoncounty.in.gov)



# Successful Monitoring- Sharing Best Practices

- What is successful monitoring?
- How do you measure successful monitoring?
- Who is a successful monitor?
- Is technical monitoring about improving technical performance?



# Successful Monitoring- Sharing Best Practices

- Verify measures that were paid for are present
- Process those measures from these perspectives:
  - The SWS
  - The Field Guide
  - State Policies & Procedures
- Identify what measures should have been done but were not
  - Process with those present & management
- Identify what measures were done that shouldn't have been done
  - Process with those present at monitoring field inspection & management



# Successful Monitoring- Sharing Best Practices

- Process with those present & management
  - Sidewall Insulation
  - ASHRAE 62.2
  - Pressure Diagnostics (especially CAZ)
  - Meaningful air sealing



# *Successful Monitoring- Sharing Best Practices*

- Document everything & write reports in a timely manner
- Give average work an average grade
- Do not make claims you are not qualified to make
- Secure sound technical assistance



# *Successful Monitoring- Sharing Best Practices*

- Successful Monitoring is about ‘Moving Forward’
- Provide a ‘Sense of Direction’
- Identify ‘Available Resources’
- Include a ‘Follow Up’ component



# Who Are You Monitoring?

- Retrofit Installer
- Crew Leader
- Energy Auditor
- Quality Control Inspector





# What Are You Monitoring?

- Energy Auditors, Retrofit Installers, Crew Leaders & Quality Control Inspectors are Residential Energy Efficiency Professionals
  - Each has a NREL JTA that details all the tasks these professionals may perform
  - Includes the Knowledge, Skills & Abilities required to do these tasks
- Policies & Procedures
  - DOE, State, Sub-grantee
- Standard Work Specifications
- Field Guide Specifications
  - Compliments SWS
  - Details installation techniques
  - Identifies best practices



# Standard Work Specifications

- Section: 6 (Ventilation)
- Topic: .62.. (Whole Building Ventilation)
- Sub-topic: ..01 (Air Flow Requirements)
- Desired Outcome: (Air flows freely between rooms)
- Title: .1 (Pressure Balancing)
- Specifications: a (No room will exceed +/- 3 pascals wrt the common area)
- Outcomes: a (Ensure free flow of air between rooms)



# State Field Guides

- The SWS identifies details & outcomes for weatherization measures
  - 6.6201.1a
- The Weatherization Field Guide should outline a set of best practices for the State to get to those SWS outcomes
  - Chapter 9: 9.4 Whole Building Ventilation Systems
- Field Guides must align with the SWS
  - Hyperlink SWS inside Field Guide
- Field Guides should incorporate information on energy auditing, inspecting, customer relations, and work flow development
  - Not contained in the SWS, Required Forms, Diagnostics, etc



# Best Practices: Tools & Approaches

- Monitoring Tools
  - Kansas
    - Pass-Comment-Rework-SWS Compliant
  - Mississippi
    - PDs?-Measures should have been done-should not have been done-rating scale
  - North Carolina
    - List Contractors-"Pass-Fail"-windows/doors-'documentation shows justification
  - Indiana
    - Monitoring form IS agency QCI form-identifies Field Guide detail for each measure
  - Missouri
    - Risk Assessment: High-Medium-Low



# *Successful Monitoring- Sharing Best Practices*

